The QuickDOC Program

(Last Rev. 18-Feb-2003)

Download and Installation

Moving QuickDOC from one machine to another

If the machine to which you're moving doesn't have QuickDOC installed (which is the usual case), it's the same as a new installation, with the following caveats:

> **IMPORTANT: If at all possible, update the current machine to the latest QD Version before making the move. This will ensure that any new install on a new machine doesn't have to deal with an older database type when trying to locate it**. If this isn't possible, be sure to point to the correct database location on installation, or see the **Database Version is Different** section in the Database section, below
>
> If you're using QuickDOC now, you can move just the QuickDOC.MDB database to a server (assuming it isn't already located there). Pick a central location that the new computer will also see and make the move from within QuickDOC by clicking setup on the menu bar, and then **Locate QuickDOC DB**. Double-click the drive and folder icons to open them until you get to the central spot, then click the **Locate Here** button.
>
> This will allow you to continue saving data on the old machine right up to the end.
>
> On the very last day you use the old machine, at the end of the day copy (or move) the following folders from your C: drive to a temporary storage spot on the network:
>
> **C:\QDBorrow** (and its subfolder BackImp)
> **C:\QDLoan** (and its subfolder BackImp)
>
> As soon as the new machine is set up, even before you install QDPortal or QuickDOC on the new machine, copy these two folders (and their BackImp subfolders) to the identical positions (right off the C:\ root) on the new machine. These folders contain all the raw data downloads (and their backups) from DOCLINE sessions.
>
> You don't have to save any of the program (QDPortal or QD) files on the old machine. Since both programs MUST be installed from scratch on the new machine (instructions below), there's no point in saving the old program files. Just the database (the .MDB file) and the two C:\ folders are all that we'll need.

Download QuickDOC

Latest instructions are always at http://nnlm.gov/quickdoc/InstallQD.html but general instructions are as follows:

> If you can take advantage of Web-based installation (some firewalls complain about it) use the WebInstall to start the install or update.
>
> If you get "Authentication Errors" when trying the Web-Based Install, get the complete installation file (the filename is QDSetup.exe, and this file comprises the complete program in a single (LARGE) download file. It actually makes for a less troubled installation in some cases, since many firewalls don't interfere with straight downloads such as this one. It may take a few minutes to get it, though, since it weighs in at over 25MB.

Check the file at http://nnlm.gov/quickdoc/QDFixes.htmlto see a list of infelicities made felicitous; check under QDNew version (e.g., http://nnlm.gov/quickdoc/QDNew211.pdf) for changes and additions to each update.

Download the QuickDOC Executable Only

In the case of **Minor upgrades only**, you can download Only the QuickDOC executable to replace your current version. This may make sense for Windows NT Installations, which often require Administrator Accounts to perform installs. If a complete installation or update isn't necessary, you can replace the executable on each machine running QuickDOC in the following manner:

- Save a copy of the current QuickDOC.exe. *** ALWAYS a good idea ***
- Right-click the shortcut and choose the Shortcut Tab to get the full path.
- Open Windows (or NT) Explorer, drill down to the folder with QuickDOC.exe (shows in right pane)
- Right-click the QuickDOC.exe filename, choose "Copy"
- Click the Backup folder in the left pane, which shows contents of the Backup folder in the right window
- Right-click on any white space in the right pane (Backup folder contents) and click "Paste" (Over-write any earlier version, should there already be a copy there.)
- Download the latest version of QuickDOC.exe, and
- Save it to the same folder as the original QuickDOC.exe (overwriting the current version), or save it to an easily located folder and then copy and paste it over the current version.

This method only works for updates where only the exe file has been changed. When in doubt, it always makes sense to do either the Web-Based installation or the Full Installation instead.

When you're asked **where to save the downloaded installation file (QDSetup.exe or QD2x.exe)**, you can save it anywhere, but make sure it's easy to find when you're finished (the desktop is often a good choice). If more than one computer will be running QuickDOC, it makes sense either to save it directly to a server which is accessible by all, or to download to somewhere easy to find on the C: Drive (like the Desktop) and then copy it to the network share.

[As always, this download is made possible by the great people at NNLM/PNR (thanks especially to Michael Boer at the RML for great support on the server side)].

Once the file is saved, close down your browser and exit any other programs that might be running. If the install program is checking for files it needs to update and one of these is open, you'll have to do a reboot of the computer to continue on, so the fewer files open the better.

Find the downloaded file on the Desktop, or in the Temp Directory (or wherever you put it) and either move it to a central Server folder, most likely the one where you intend to keep the central QuickDOC database, if you want to run the **installation or update on a number of machines attached to the server**, using the central QuickDOC.MDB database. If you're installing on this one machine only, just install from there.

QuickDOC and QDPortal will work together, but they are still separate programs as of this 2.0.x release. They'll be joined eventually, but it's still possible to have both running at the same time, and to pop back and forth between them using the Taskbar as a tool to do so.

Installation

Each machine that will be running QuickDOC will need to run the Install.

Even though the data files will be saved on a server, the program itself will be installed and running on a local machine, and that machine MUST have certain files installed and available locally. You'll be choosing a local C: Drive folder first (usually QuickDOC under the Program Files folder, unless you intend to put the data files on a NetWare server which doesn't support long filenames---if that's the case, then you'll want to choose the shortest possible file paths for BOTH the program and the database: use C:\QuickDOC for the program; and something like F:\Apps\QuickDOC for the database files).

Rights to Install

Whatever you decide about the location of the Program files and the Database, if you're doing an initial install (or an upgrade that requires installation of additional support files---something other than just the overwrite of QuickDOC.exe, as outlined in the instructions for "Minor" upgrades, above), you'll need Admin rights, in most cases, if you're installing on **WinNT 4.x or greater**.

Memory Requirements – 64MB+ RAM Memory Installed

QuickDOC may run with 32MB RAM memory, but 64MB RAM is the practical minimum, and the best environment will have 128MB available for forms and current data.

Operating System Requirements

QuickDOC will run on any 32-bit Windows system, but there are some caveats based on known Win32 OS limitations:

Win95: Versions earlier than 4.00.95b may have some problems.

WinNT: QuickDOC will not load if the **NT Service Pack 5 or greater** is not loaded.

Internet Explorer Version Requirements – IE4 or greater; IE5 recommended

QuickDOC (or QDPortal in versions where the Web Browser is outside of the Main Program, which is the case in anything less than QuickDOC 2.5) must use Internet Explorer Version 4.x or greater. IE 5.x is recommended, if this is practical; there are still transient problems with IE 5.5 and 6.x, although QuickDOC will work with either.

MDAC (Microsoft Data Access Components) Requirements

QuickDOC requires **MDAC 2.6** (installed with SQLServer 2000 and later) and may therefore need an MDAC installation on first install or update. Once MDAC 2.6 is installed, it can't be uninstalled, and the operating system will continue with that version whether QuickDOC is uninstalled or not. Windows XP uses MDAC 2.7, so users with XP won't see any new MDAC components installed.

Information on MDAC versions is available at http://www.microsoft.com/data/download.htm

This site also provides a download of the Component Checker program, which does an analysis of your current MDAC installation and can be used to diagnose errors in the installation. As described at the Microsoft web site:

The **Component Checker** tool is designed to help you determine installed version information and diagnose installation issues with the Microsoft Data Access

Components (MDAC). Component Checker runs on the following operating systems: Microsoft Windows 95, Windows 98, Windows NT 4.0, Windows 2000 and Windows XP.

MDAC is installed with numerous Microsoft products and also can be redistributed using the redistribution program (mdac_typ.exe) accessible through the links on the rest of this page.

Component Checker is a customizable tool that performs the following tasks:

- Identifies the current MDAC installation on a computer.
- Creates a series of reports about the files identified for the current MDAC installation.
- Removes the current MDAC installation after listing .dll conflicts and identifying programs that reference a given .dll.

Executing the Installation Program

Once you've decided where your QuickDOC folders will be located, find the **QDSetup.exe** (or **QD21.exe** for Web-Based installs) file (either on your Desktop, or in your default Download folder, or at the central network folder where you saved or moved it) and execute it (a double-click will do it). The Wise Installation Program will begin.

> [In the event that your browser saves the file to some unknown destination, you can find the downloaded file by opening up Windows Explorer -- Start Button - Programs - Windows Explorer -- clicking once on the C: Drive if it's not already highlighted; then click "Tools" at the top, and "Find File" <filename>. (The Filename is QDSetup.exe.) Once you've found it, double-click on it to begin.]

Long Filenames.

If you're storing the QuickDOC.MDB database on a server, and it's a NetWare server, make sure it can handle Long Filenames. This isn't a concern with NT Servers, or Windows versions after NT 3.5.

Otherwise, every attempt has been made to make to permit the QuickDOC.MDB database to function on a Long-Filename-Challenged server, but no guarantees are possible. Better to use an NT Server or greater, or to store the QuickDOC.MDB database locally, if only one machine will be using it, in the Program (C:\Program Files\QuickDOC) Folder.

QuickDOC.MDB on a Server

If you're not concerned with the long filenames problem (you're using NT or a version of NetWare with the proper patch), you can take the long view and establish the QuickDOC.MDB database on a central server. This is usually the best approach. Advantages here are obvious: regular backups; easy installations on new workstations; etc.

QuickDOC Program Files Installation

Put the QuickDOC Program in its own folder under "Program Files" (this should be the default anyway, unless you've already downloaded it and placed it someplace else). Make the backup folder when asked. If you ever need to **uninstall QuickDOC**, you can do so in the Control Panel - Add/Remove Programs, and any system files updated in the installation will be returned to their older versions (it won't delete any database files, though, just in case you find you really do want that data back).

MDAC

Because this installation also installs the latest **Microsoft Data Access Components (ADO 2.6)**, unless you happen to be running Windows XP, or you've installed MDAC for some other reason, you'll notice that you're prompted to reboot once the MDAC files are installed. This upgrade must be completed and Registry files updated, before any other files are installed, so you'll probably have to reboot at least twice during the first installation, although this will only happen the first time.

Installation Steps

1st Step: Download the Update File.

`The latest QD Update Information is always in the QuickDOC Upgrade document: Links for Update Files are always at this address.`
http://nnlm.gov/quickdoc/InstallQD.html

QuickDOC Full (NoWeb) Install

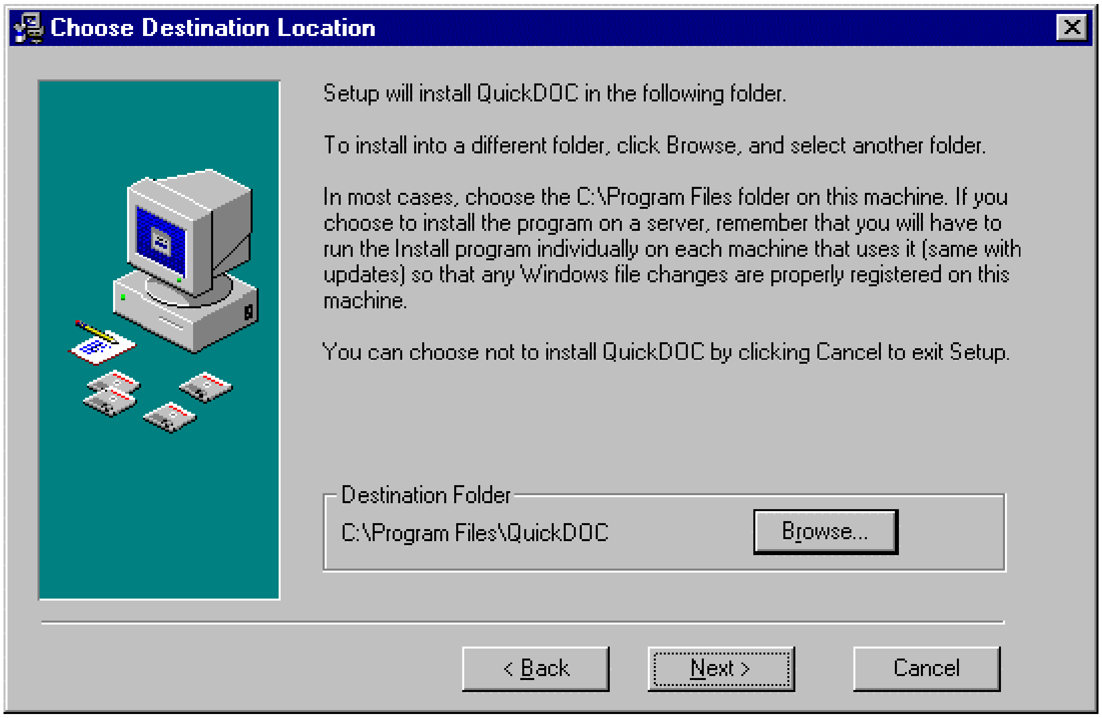
Click on the complete installation file link (or the one to the left, if it's highlighted) to install the upgrade (or new version) from one download. Save the QDSetup.exe file to a central source (if there are multiple machines using QD, run the QDSetup.exe from EACH machine to be sure that all files on the local machine are properly updated) or to the Desktop (or other easily located folder, so you can be sure to find it when you need it!) on each machine where you want to run the upgrade (or install).

QuickDOC Web-based Install

Click on the Web Install File (QD20.exe) at http://nnlm.gov/quickdoc/QDManual/QD21.exe. Instead of the full Local Install (QDSetup.exe) and Save it to the Desktop. The best place for either the Web Install file (QD2x.exe) or the full Install file (QDSetup.exe) is the Desktop.

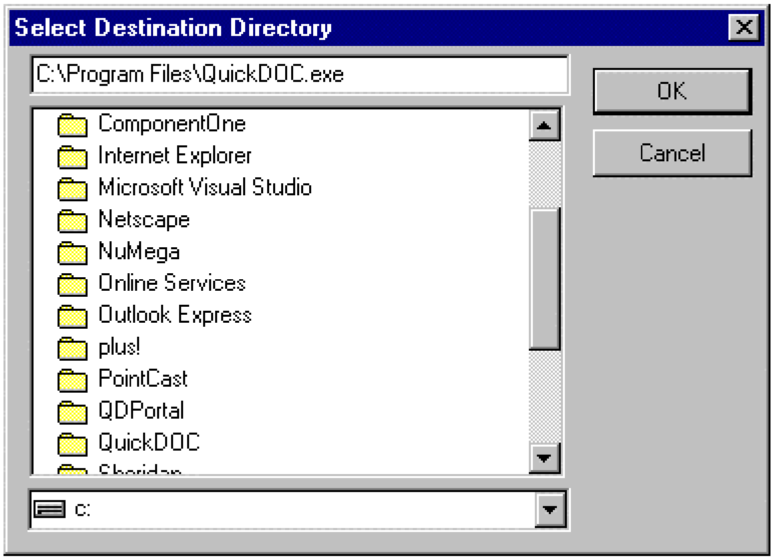
2nd Step: Run the Installation Program.

Click on either the **QDSetup.exe** (Full download) or **QD2x.exe** (Web-based install) to begin running the Installation Program. You can mostly take the defaults on each screen, but pay particular attention to the "**Destination Folder**" you are offered at the beginning of the install:

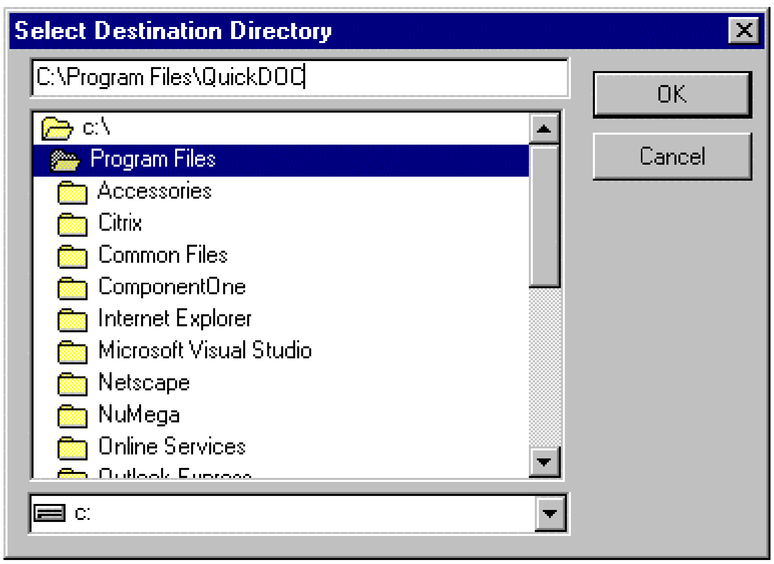


Always make sure that the Destination Folder show on this screen is the folder where you want the program to be located. The **default program folder on first installation** will be the C:\Program Files\QuickDOC folder pictured above.

Watch the Destination Folder on Updates, especially, to make sure that update installations are going to the same folder that the original installation was lodged in. It doesn't happen often, but occasionally the Install Program may get confused if an earlier installation was made on a different Drive. A common indication of this confusion is when the executable filename, QuickDOC.exe is somehow substituted for the folder name (sometimes you'll see an **UNWISE.EXE** appended at the end, for some reason; this is also a non-starter and needs to be fixed). This setup will obviously cause an error and must be fixed. Use the **Installation Program's Browse Button** to **Select Destination Directory**.



As you can see above, QuickDOC.exe is not a likely folder name. You can edit this item directly, by clicking at the end of that top line and backspacing over everything back to the C at the end of QuickDOC. The box will now look like this:



Click Ok and proceed with the rest of the Install. The other defaults rarely cause any trouble, so it's best to click Next until the installation is complete. Depending upon the machine and Operating system, the process of "**Updating System Components**" may take some time, so be patient and allow the process to be completed.

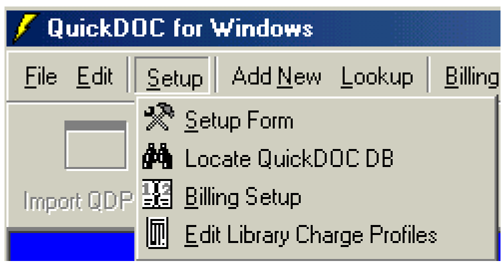
When the install is finished, you will probably be prompted to reboot again, depending upon whether files needed to be updated

Preparing for First Use

You'll now see a new QuickDOC Shortcut on the Desktop. It's time to **decide where the QuickDOC.MDB Database will be located**.

Locate the QuickDOC.MDB Database

1. In general, **if you think that more than one computer will be using the files, it's best to locate the data files on a network drive**. Make sure that all potential users have all rights, including Create, Delete and Modify Files, Folders and subdirectories in the folder you choose.
2. If **only this machine will be running QuickDOC**, the database will be located, by default, in same folder where the QuickDOC.exe file is located. You can always change the location later using the **Locate QuickDOC DB choice under Setup** on the QuickDOC Menu Bar.

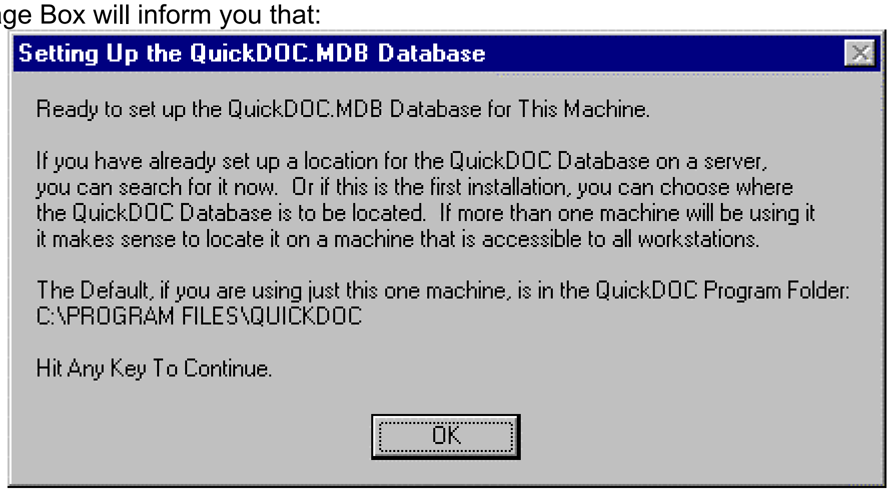


3. The Locate QuickDOC DB choice leads to the **QuickDOC.MDB Database Operations Form**, which is used to move the QuickDOC.MDB database, as well as to identify the location on first installation (see below).

Setup QuickDOC.MDB Database on first Installation

The first time you start up QuickDOC, you'll first be asked to determine your database location. This will also occur the first time each new user or machine performs the install, though in those cases, it's just a matter of pointing to an existing database rather than deciding where it goes in the first place.

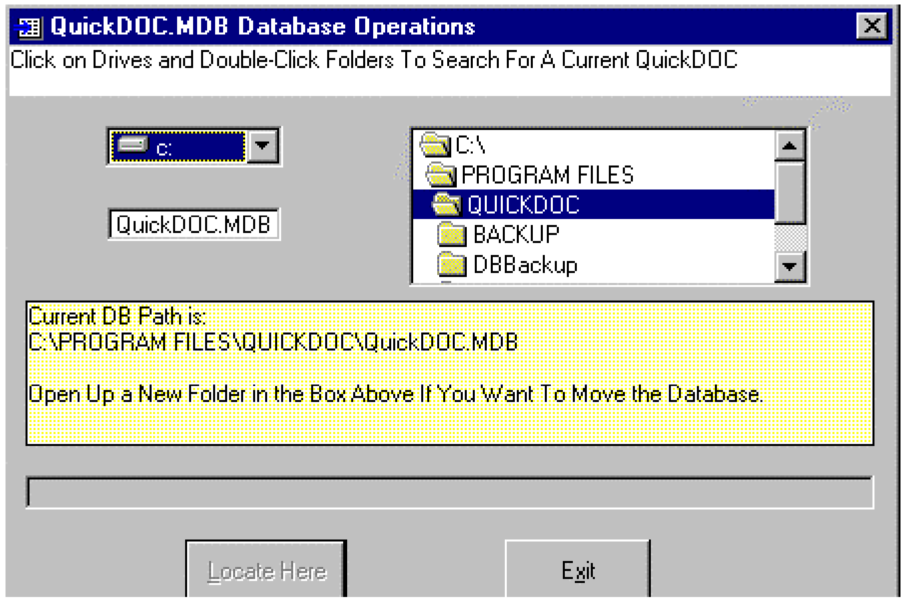
The Message Box will inform you that:



1. If you've already set up a db on a server, you can search for it;
2. If this is a 1st installation, you can choose a server location or stay local;

3. The default will be the folder where the program has been installed.

Hit any key, or click the OK button, and you'll get a chance to select the database location, using the familiar Windows Drive and Directory List Boxes. If you already have a central database location, then use the List Boxes to point to the site of the database for this installation. This will ensure that all machines are saving data to the same database.



The form will open with the **default C:\Program Files\QuickDOC\QuickDOC.MDB location**, as is the case above. The **Locate Here** Button will be enabled, so if you're satisfied with the default location, just click **Locate Here** and then **Exit**. If you want to locate it at a previously created central server location, click the arrow to the right of the c: in the **Drive Box**, above, to expose the list, then double-click the Drive icon next to the letter you want. This will expose the list of folders for that Drive in the **Directory Box** to the right. Open the necessary folders to drill down to the one you want by double-clicking on the folder icon until it opens. If you're installing on a **second machine on the network**, when you've opened the folder where you want to locate the database, you'll see "**FOUND ONE HERE**" in the yellow box, indicating that a QuickDOC.MDB database already exists.

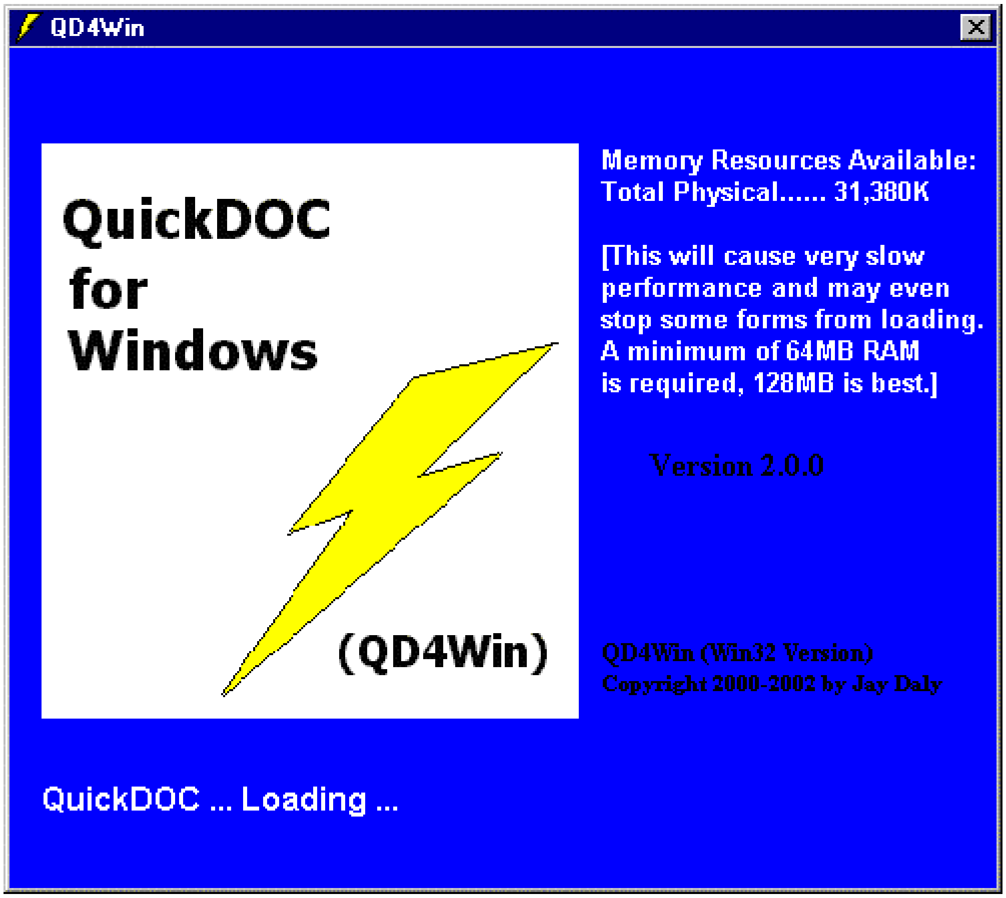
When searching for the central data file, each time you double-click on a folder where a QuickDOC.MDB file exists, a message will appear stating that a QuickDOC.MDB file was **FOUND HERE**, along with the file information: **File Size; Last Accessed**, etc., and the "**Locate Here**" button will be enabled.

If this is the first locate operation, just click **Locate Here** when you've found the proper folder and then **Exit**.

The Database is an **Access 2000 style database** called **QuickDOC.MDB**. Although you don't need Access 2000 installed on your machine, if it is installed it can be used to format your own local reports, etc. If you want to work with the database tables directly, it's usually wise to work on a copy of the database rather than the real thing.

Memory Problems on machines with less than 64MB RAM

Because there are some forms with a large number of controls, boxes and other data, computers with only the minimal 32MB of memory will probably have problems during the course of operation. To be safe at least 64MB of RAM should be installed; 128MB will improve performance that much more. On the **QuickDOC Splash Screen at Startup** there will be a notice of **Memory Resources Available**. If those resources are at the low end, a more elaborate notice is given:



If you see a message like the above on startup, then it's time to think about installing a memory upgrade. You'll avoid problems and also experience a marked increase in performance.

Database Installation Troubleshooting

Problem Opening Version Table

When you see "**Problem Opening Version Table**" as QuickDOC starts up, in most cases it means that the database isn't being found where the program thinks it should be (it can also occur if someone has locked down the database for some maintenance operation, but this will rarely be the case, and if it happens just after downloading an update, then it's probably a location problem).

Each machine running QuickDOC keeps track of where the database is located by checking a Registry entry. If it doesn't find the db there, it next looks in the program folder (typically, C:\Program Files\QuickDOC) to see if it's there.

If it finds one there, it will go ahead and use that one, but if not, you'll get that error. In general, this could occur if the database was moved outside of QuickDOC (rather than with the "Locate QuickDOC DB" form) and consequently the Registry entry no longer pointed to the correct location.

Try this as a way to recover. First, use Windows Explorer (or NT Explorer) to check whether the QuickDOC.MDB database file is in the folder you expect it to be in (the recommendation is either the QuickDOC Program folder, if you're using only one machine or some file server location if you're using more than one). If it is, and if the size of the file is greater than 4720K or so and it was recently accessed, then it's probably the one.

If you want to look and see where the **Database Registry Entry** thinks the db is, do this:

1. Click the Start Button, then "Run."
2. Type: regedit in the run box and click OK.
3. When the Registry Editor comes up, click the + sign next to the following:

   HKEY_CURRENT_USER, then

   Software, then

   VB and VBA Programs, then

   QuickDOC
4. Under QuickDOC, you'll see a Database folder; click once and its values will show up in the right pane. The path next to "Location" is where the program THINKS the db is.
5. Make a note of this path and close the Registry Editor (DON'T try to make any changes with the Editor!) either by clicking the x on the upper right or clicking "Registry," then Exit.

Next look in your Program folder (C:\Program Files\QuickDOC) to see if there's a default QuickDOC.MDB file in there. If there isn't, you can rename the QDUpd.MDB file to QuickDOC.MDB and try to start up again. If this works, then skip to **Locate the DB Again**, below.

If there's already a QuickDOC.MDB in the Program folder and you're still getting the error, then your best bet will be to delete the Database key so that QuickDOC sets up the location anew. Follow all steps in the list two paragraphs above until number 4. In number 4, where you first see the Database folder under the QuickDOC key, right-click on the folder icon and choose "Delete this Key." Once the key is deleted, choose Registry from the menu bar, then Exit.

When next you start up QuickDOC, it should announce that you'll need to identify the Database location, etc. If you're not brought directly to the "Database Operations" window, then...

Locate the DB Again

Click "**Setup**" on the menu bar, then "**Locate QuickDOC DB**." Find the Drive and directory where you want the db to be located by clicking on the proper drive in the drive box, then double-clicking on folder icons until the one you want is highlighted in the directory list box. Click the **Locate Here** button and wait until the Exit button is highlighted (will happen nearly at once if there's no QuickDOC.MDB in the location already). Click **Exit**, then exit all the way out of QD and come right back in (just to be sure the Registry is rewritten).

Use the same **Setup** and **Locate QuickDOC DB** choices on each machine to make sure that all machines are pointing to the same database. **Current database location is displayed on the Status Bar** of the main blue QuickDOC screen (unless it's hidden by the Task Bar) and also in the yellow box that displays in the middle of the "QuickDOC.MDB Database Operations" form when it first appears (after Setup - Locate QuickDOC DB choices).

This is a bit complicated, but will get the job done. Once the db is established, don't move it except by using the form mentioned above.

Windows NT Workstation Installations:

Thanks to Anne Comeaux at UTHSC San Antonio posted a message on QuickDOC-L regarding NT4.0 Installs for QDPortal. This also applies to QuickDOC (just substitute QuickDOC for QDPortal, below):

> We also have NT 4.0. I received the [DLL in Use; Reboot Message], but, in my case, the computer did not automatically reboot as I canceled the install. I had to log in with an NT Administrative account and install the portal program in that way. I then set the NT permissions for the desktop QDPortal shortcut to allow access for the users in our ILL department, giving each of them full control. I then copied the shortcut from the desktop to the C:\winnt\profiles\all users\desktop and C:\winnt\profiles\all users\start menu folders. Now, the users I gave permission to use the QDPortal shortcut can log in as themselves and use the program. Each user has to setup the login, password, LIBID, and address once the first time they click the QDPortal shortcut.
>
> I hope this helps. If you do not have administrator privileges for your Windows NT network you may have to get help from someone who does.

This situation occurs only when NT Security is set up to restrict the ability of individual users to access certain areas of their own machines. **Only a user with Admin privileges can perform installs or access certain parts of the Registry**. Also, certain values are kept in the Registry under the "Current User" Key, so each user may have to log in once to write values to his or her username. Values saved with QDPortal will already be there, for those who have used the QDPortal Program. If you are doing an Update, not an original Install, and are brought to a blank Setup Screen right after starting up QuickDOC, then check to be sure you're logging in under the same username as the previous setup. Have a look at the Registry Settings under your username as described **under Problem Opening Version Table**, above.

Registry Settings Made by QuickDOC and QDPortal

The following Registry Settings are made by QuickDOC and QDPortal, on first startup in some cases, and as needed in others. All the settings are in

HKEY_CURRENT_USER\Software\VB and VBA Program Settings\QuickDOC

Or HKEY_CURRENT_USER\Software\VB and VBA Program Settings\QDPortal

QuickDOC Registry Keys:

\Database\DataSource - holds the full DataSource name for ADO Connection String

\Database\Location - holds the full path to the QuickDOC.MDB database

\Database\Provider - holds the full Provider name for ADO Connection String

\Database\ProviderString - equals "Jet" for MS Access 2000

\Database\Security - holds the full Security setting for ADO Connection String

\Identity\AddrID - identifies Local Address record in QuickDOC.MDB

\Identity\AddrID - identifies Local Address record in QuickDOC.MDB

[most of the entries now under …\Identity will be moved to the database in due course, and Registry entries will be deleted.]

\Initialization\ErrorLog - identifies type of errors being logged (full or abbreviated)

\Initialization\FirstPortalImport - set to "Done" once this has been accomplished on this machine

\Initialization\Initialized	- set to “true” after first running
\Initialization\OldDOSDir	- identifies old DOS QD Directory, if any.
\Initialization\PatsListImported	- set to “true” when an old Patrons File has been imported
\NLM\DefaultRP	- used by QDPortal if a Default Routing Prefix is specified
\NLM\DOCLINE_HTTP	- used by QDPortal to specify DOCLINE URL
\NLM\LIBID	- LIBID of this Library, will probably be moved to the database
\NLM\NNADays	- used by QDPortal as the default Not Needed After days
\NLM\Password	- used by QDPortal to send Login Password, if desired.
\NLM\SendPatronNumberOnly	- If set to “True” will send the Patron Number only to DOCLINE
\NLM\UserID	- used by QDPortal to send Login User ID
\Printing\InvoicePrinter	- identifies the Printer that this machine uses to print Invoices
\Settings	- holds the last settings of the Main Program Form to restore
\Version\CurrentVer	- holds the current version of QD to compare with DB version.

QDPortal Registry Keys:

\Initialization\Location	- holds the current location of QDPortal program.

Installing on NetWare 3.12 or other "long filename challenged" servers

As mentioned above, if you're using a version of NetWare that doesn't support long filenames (you'll know if you ever tried to install a Windows Program on the Server, probably, if you are), you may run into trouble, even if you keep all your files on the C: drive (which will happen if you install from a QDSetup.exe that happens to be on the network). If this is the case, use the shortest possible file paths. We've been successful with **C:\QuickDOC** for the Program Files and **F:\Apps\QuickDOC** for the DB files.

Running Multiple QuickDOC.MDB Databases from One Location

> We are two hospitals in a system network. We have a QD subscription at each library. Our IS department would like to set up QD on the network with two folders, one for [Library A] and one for [Library B]. They then would like to have both available on the pc's at each site so if someone is sick or on vacation the other library could pull requests etc..
>
> It is important for us to maintain both copies of QD for statistics and funding. Is there anyway this can be done?

I'm planning to make this kind of setup easier at some point (probably not until after QD and QDPortal are joined, though, and I'm not sure exactly when THAT will be), but for now it's a bit difficult to do both libraries on one machine. In part this is because the program keeps the current database location, and other indentity stuff in the Registry of the machine being used, under the HKEY_CURRENT_USER\Software\VB and VBA Program Settings\QuickDOC\Database key, so one set of data there would undoubtedly conflict with another.

If you set up two user names, that would work---you could log in as one for one library and the other for the other library---but I expect this would also cause problems down the road, because of the way QDPortal is currently set up. Because the two programs work in a serial fashion: QDPortal logs into DOCLINE, captures the data as text files in either C:\QDBorrow or C:\QDLoan, where it sits until you start up QuickDOC and click the 'Import QDPortal' button, there's always a danger of getting these captures mixed up, so that records meant for one db would go to the other. The backups of the capture files, which are kept in a BackImp folder just beneath the main capture folders, would automatically be mixed, and would be useless as a way to restore any data lost. And the Patrons List that appears in QDPortal, which is created and refreshed from the Patrons Table in the database whenever QD is run on that machine, would also be problematic.

Once the two programs are joined, though, these problems will diappear; it's just that I don't know how long that'll be.

Meantime, though, there might be a solution. **Locate the QuickDOC.MDB database from each library** (use Setup on the Menu Bar, then Locate QuickDOC DB) **in a separate folder on a shared drive**, if you haven't already done so. Make sure that all the machines but one from library A point to [Share]:\LibraryA\QuickDOC.MDB. Same with Library B to [Share]:\LibraryB\QuickDOC.MDB. **Designate one machine in Library A to do the Library B work (and no Library A work)**, and vice versa for Library B. This will ensure that the Registry on that Library A machine will always reflect the Library B settings, and that the C:\QDBorrow and C:\QDLoan and Patrons text files will also be Library B. And the reverse at the other library.

Kludge, but it would get the job done.

Updating from QDLend

Update Installation

Download and install QuickDOC as you would for a new installation (see Installation, above). While you can install in the same folder as QDLend, it makes sense to create a new folder, so that you can easily uninstall QDLend and delete its files once the full QuickDOC program is functioning satisfactorily.

The default installation folder will be C:\Program Files\QuickDOC in most systems, but you can choose another if that's more convenient.

The installation program for QuickDOC will update some of the QDLend support files (it uses Microsoft Data Access Components version 2.6 instead of 2.5 of QDLend, so you may see a message about installing MDAC 2.6 and requiring a reboot of the computer to continue), but others will have been installed already, which will speed up the installation process.

Once you've decided where your QuickDOC folders will be located, find the **QDSetup.exe** (or **QD20.exe** for Web-Based installs) file (either in your download folder or at the network site where you saved or moved it) and execute it (a double-click will do it). The Wise Installation Program will begin.

QuickDOC Shortcut on the Desktop

Take the defaults during the installation program, unless you've decided to install the program files in a folder other than C:\Program Files\QuickDOC, and you'll be left back at the Desktop with a new **QuickDOC Shortcut icon** (it's the same as your old QDLend icon).

When you click on this icon for the first time, the process of moving your data from the old QDLend.MDB to the new QuickDOC.MDB will begin.

Database location for Updates from QDLend

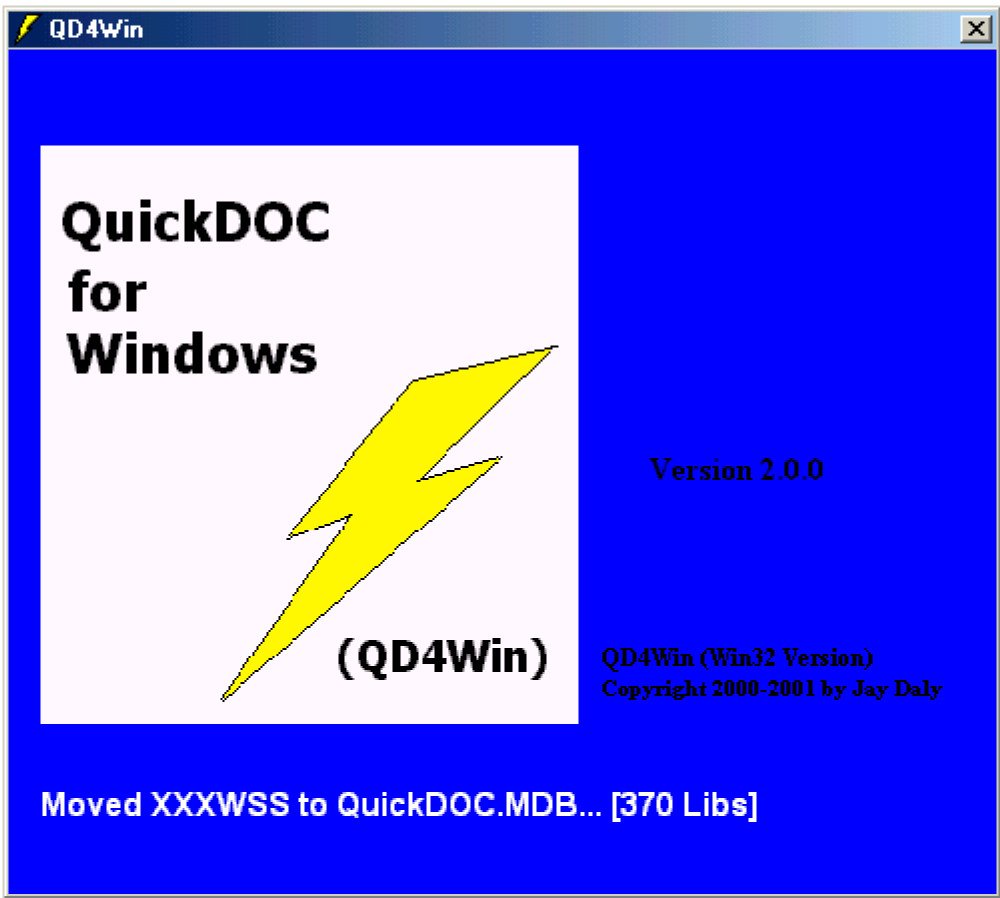
The QuickDOC.MDB database will be located initially in the following manner:

1. **QDLend.MDB was on either the C: or D: drive**: The new QuickDOC.MDB will be located in the same folder as the program itself (i.e., the spot you chose during installation, generally C:\Program Files\QuickDOC). This should help alleviate some of the confusion in finding the database file that existed in QDLend. You can still move it to a server location (or anywhere else for that matter) but the default will be right where the program itself is running.
2. **QDLend.MDB was on a network share** (anything but C: and D: usually---but not always---means that this is the case): The new QuickDOC.MDB will be located in the same folder that currently holds QDLend.MDB. This should ensure minimal disruption of current configurations. Both QDLend.MDB and QuickDOC.MDB can co-exist, side by side, but since all the data in QDLend.MDB will be transferred to QuickDOC.MDB, after some time of testing to be sure all is well, the QDLend Program, and the QDLend.MDB database, can be deleted. No reason to rush on that, though.

What will be transferred from QDLend.MDB?

1. All the Borrowers created in QDLend will be moved to the much more expansive Libraries Table in QuickDOC (tblLibs).
2. The Titles Table in QDLend will be matched against the much larger tblJrnls in QuickDOC, and any Journal Title not already in the new Table will be brought over.
3. All items in the Credits, Deposits, Invoices and Payments tables will be moved over to similar tables in the new database.
4. All Lend Items from the old database will be moved to the new one. Since the new database has a more intricate set of connections amongst tables, each of these old items will be double-checked in the new database to be sure that all proper interconnections exist.

Because the new database structure is much more detailed than the old one, this checking may take some time to complete, but there will be visual notices on the Splash Screen as the process continues:



If there are any problems with moving the data, you may see Message Boxes like:

```
        Problem Moving Records from [a Table] in QDLend.MDB
You may need to enter items manually or import from the File Menu.
```

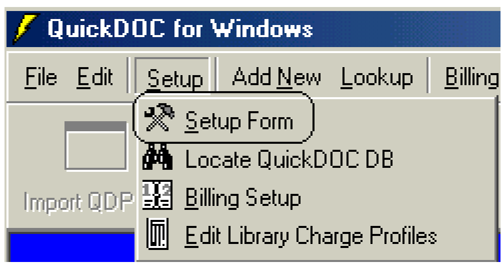
You can generally ignore these, since the Tables already exist in the new QuickDOC.MDB database, for smaller tables such as Credits, Deposits, etc. In most cases, when you receive this message for those tables, it means that they don't exist in the old database (as they wouldn't if you were still running a QDLend version earlier than 1.5.6). If the message appears for the Invoices table, or the Payments table, then that is a different can of worms, since those have existed for some time. You may need to re-enter data, using Access 2000, if that occurs.

Ignore the 'Import from the File Menu' note, in any case, since it doesn't work between QDLend and QuickDOC at this time.

First Use --- Follow These Steps

Step One: Run the Setup Form

Once the records from the old QDLend.MDB database have been moved over to the new QuickDOC.MDB, you'll be brought either to the blue QuickDOC screen or to the Setup Screen. If you arrive at the blue screen, click 'Setup' on the Menu Bar and then 'Setup Form' to bring it up.



The **Setup Form** will retain many of the choices made in QDLend (and also QDPortal, which writes to the same part of the Registry as the QuickDOC program in many cases). Most of the data will therefore already be filled in if you're updating from QDLend.

These items are used by QDPortal, as well as by QuickDOC:

The **DOCLINE UserID** and **DOCLINE Password** should match those given you by DOCLINE.

The **Library ID Code** is your library's NLM LIBID.

The **Default # Days** will compute a Not Needed After Date for each request based on this number of days.

The **DOCLINE Address** is either the original http://wwwcf.nlm.nih.gov/docline/index.cfm or the latest abbreviated version: http://docline.gov. They both work as of 12/2001.

The **Default Routing Prefix** (partially obscured by the Tool Tip below) should be filled in only when you typically send most of your requests to one library on the first route. If that's the case for your library, then put their LIBID in this field; you can then click a button in QDPortal to fill in that field on DOCLINE automatically.

There is more on the Setup Form in the next chapter.

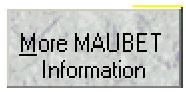
The values to check on updating are:

1. Make sure the Street, City, State and Postal Code values have been properly translated from the old QDLend single-line format. If they are not, then you can fix them while editing your library information, and then again here.
2. The Default Charge Profile will have been created from the Charge that was filed with your library in QDLend. If that charge was $11.00 then the Charge Profile created will be named 11Lib. If your typical charge was $3.00, then you'll see a Charge Profile of 3Lib. If your QDLend record showed a charge of 0.00 then your profile will show 'Free', as above, with a Default Charge of 0.

If you click the Down Arrow on the right of the Charge Profile box, you'll see a list of Charge profiles created as a result of the transfer of data from QDLend. Any Library in QDLend with a charge associated with it will generate a Charge Profile in QuickDOC with the format of: [that Charge Amount] Lib. If your typical charge is $11.00 then there will be a Charge Profile of 11Lib, with an initial value of $11.00 charge for Borrow and $11.00 charge for Lend. Nothing is assumed in the Fax Surcharge or Rush Surcharge areas of the Profile. These you will create later.

Step Two: Check Library Information from QDLend

Click the [More (your LIBID) Information] button. For library MAUBET (which is my Beth Israel Deaconess Medical Center here in Boston), the button looks like this:



This button brings up the Library record for your local library values (which include many of the defaults that the program will assume in various circumstances). The Default Local Delivery Method, for example, will be the one you've chosen in your Library record. Records for Libraries are displayed with a number of Tabs.

Library Form – The General Tab

The General Tab presents general Library information, along with a snapshot of values set on other Tabs. See the chapter on Libraries, below, for more information.

The General Code and the NLM LIBID should be the same. Add any other values.

Library Form – The Address Tab

The Address Tab contains local address information. This should have been transferred from QDLend, but check to be sure the Address values were parsed out properly.

Library Form – The Comms Tab

The Comms Tab has local communications information. Most of this should have been successfully copied over from QDLend.

The Preferred Delivery you choose here will also function as the **Default Preferred Delivery Method**. The fields in the ISO ILL Information box aren't used until the ISO ILL Implementation.

Library Form – The Charges Tab

The Charges Tab contains information about charges and payment options. Most of the information kept here is for libraries other than your own, but the Charge Profile you select here will function as the **Default Charge Profile** that is applied to newly created libraries.

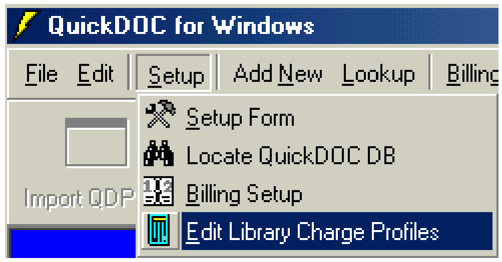
Charge Profiles that determine how you charge and are charged by other libraries are filed with those library records. This concept is discussed further in the Libraries chapter, below.

The Preferred Payment Method combo box will also set the **Default Library Payment Method** (currently this is set as "Mail" but will be configured shortly, so that the choice EFTS shown below will become the default for new Libraries.

The "This Library Uses EFTS For Payments" checkbox, however, should be checked if you want the incoming Receipts from other libraries to show the EFTS status when they come in marked "Epayment." If this box is left unchecked, then no incoming Receipts will be marked automatically as EFTS.

The State/Province Sales Tax box isn't implemented yet and will have no effect.

To **edit Library Charge Profiles**, use the menu choice under the Setup Menu.



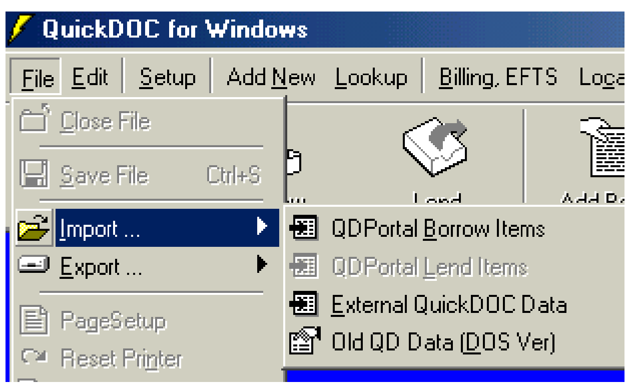
Library Form – The Groups Tab

This Tab is used in other Library records to assign various Groups (called General and Special in old QD).

Step Three: Import Dept, Patron & Borrow Information from old QD

Before performing the first Borrow import from saved QDPortal records, import Department and Patron records from old QD. If you were using the Patrons List in QDPortal and some of those records were imported from old QD, then you need the [Patron Numbers] in brackets to effectively match up the QDPortal Patron records. And we need the Department records that pertain to each patron. Patrons no longer needed can be deleted after import, and after the initial import from QDPortal Borrow records is complete.

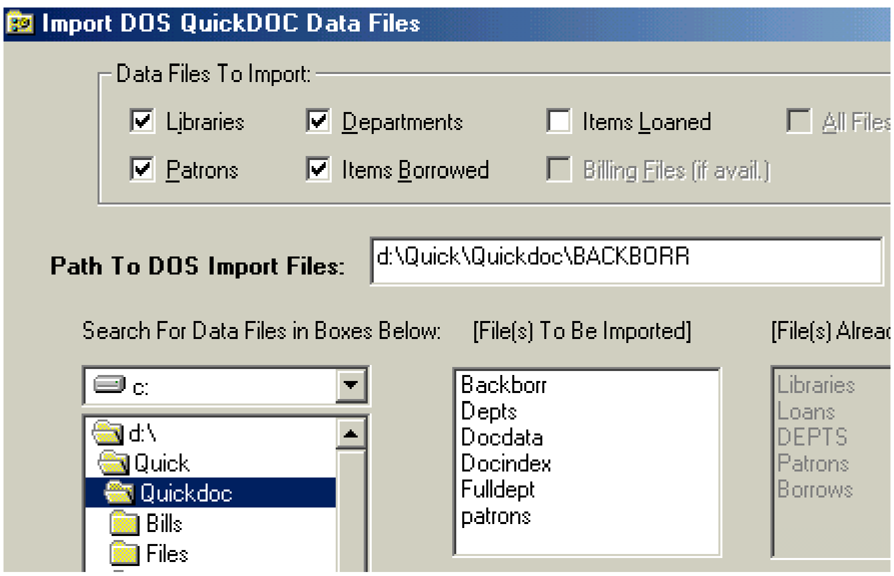
The **Import Old QD Data** (DOS Ver) menu choice is under the File Menu, Import choice.



This brings up the Import DOS QuickDOC Data Files form. If you've already imported Libraries or Lend Items from old QD, then the "Path To DOS Import Files" will be filled in properly (assuming you haven't changed computers since then). If nothing has been imported before, use the Drive and Folder boxes to find the location of the old QD files (it looks for a folder with a file called QDCOMMS, which all old QD directories have, and displays relevant files if that file is found).

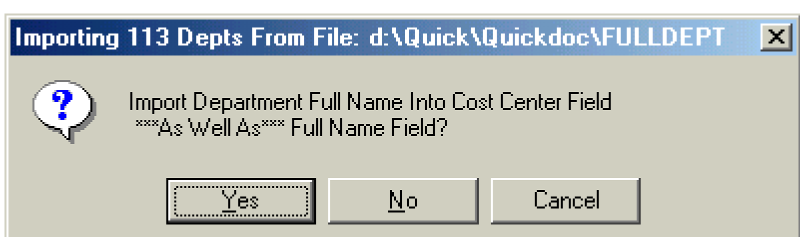
First, if you're going to import any of the Borrow Items you've stored in old QD, set the **Import Date to Begin** importing Borrow Items (or Lend Items, for that matter). You can always come back and import earlier Borrow Items later.

Check the Libraries box if you haven't already done so in QDLend (if it's already been imported then you don't need to do it again, although it won't duplicate anything that's already in there). Check the Patrons and Departments boxes, and the Items Borrowed box if you want to also import old QD Borrow Items from Jan 1, 2000 (the default Begin Date) or earlier.



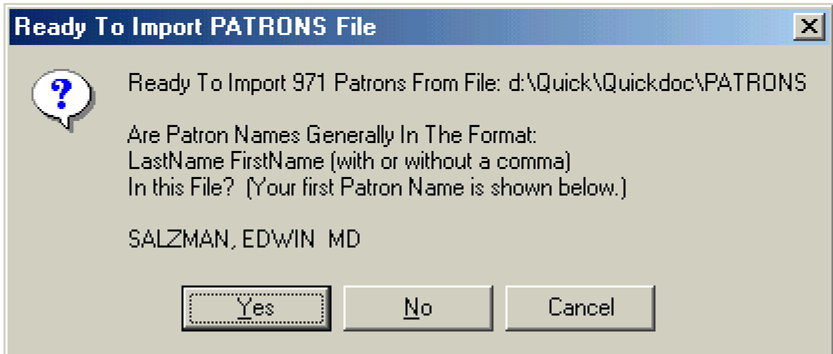
Importing Departments

The first group to be imported will be Departments (which are needed for proper Patron and Borrow Item imports). For those who might have used the Department Full Name field in old QD as a Cost Center field, you can also populate the Cost Center field in the new database:

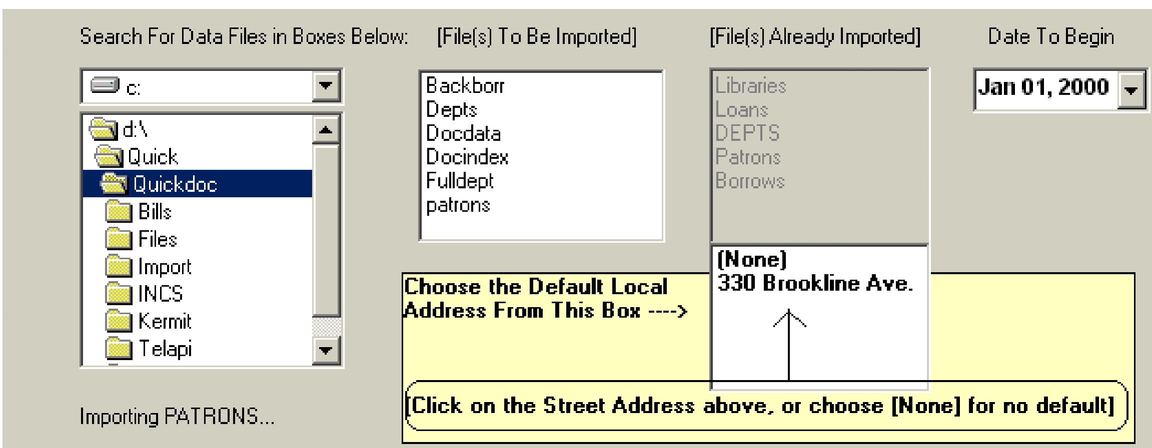


Importing Patrons

After Departments are imported, Patron Imports begin. In order to properly parse the Patron Name line in old QD, the import program will first ask about the typical format for Patron Names in old QD:



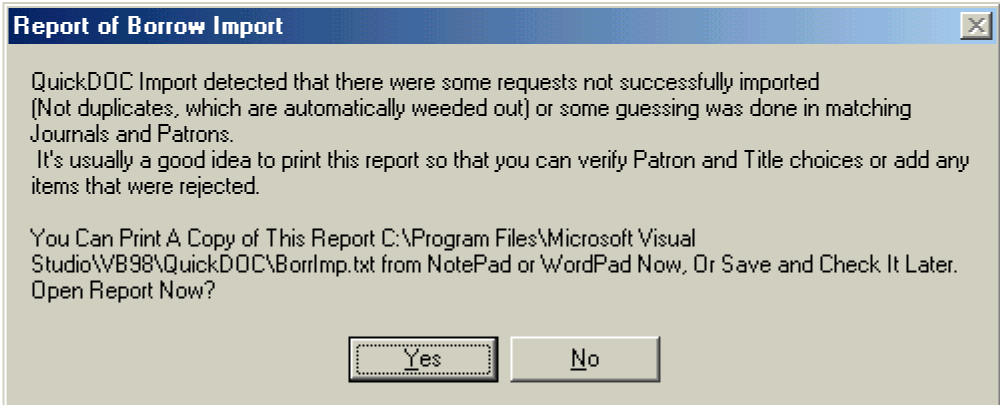
You'll also be asked for the default local address to be assigned to each Patron (Patron addresses weren't saved in old QD, but Dept Addresses were, so if any addresses were imported along with Departments, they should appear in the List Box. Otherwise, (None) will be the only choice.



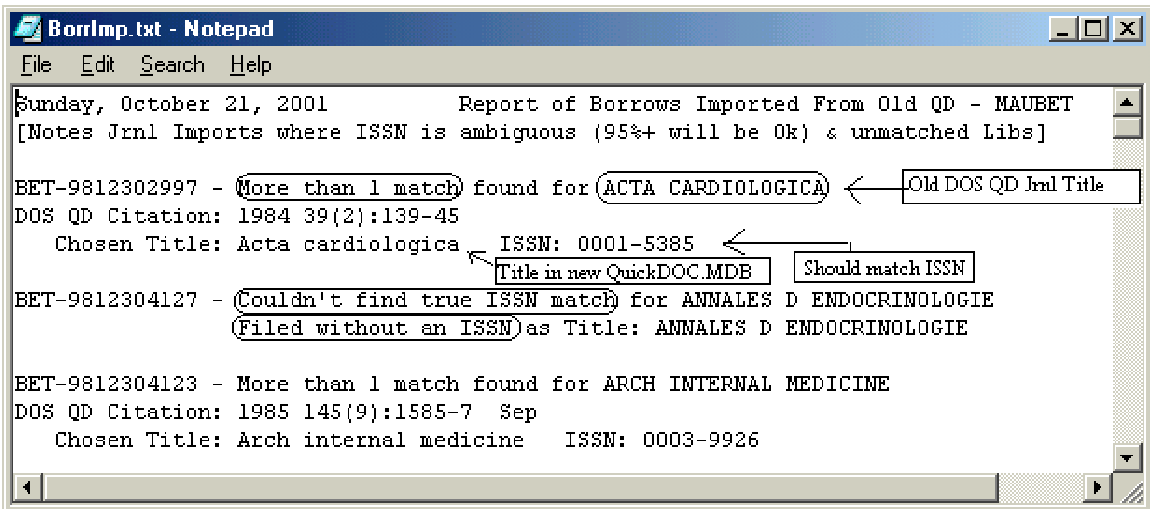
Click on either (None) or an alternate address to apply it to Patrons imported. Patrons with different addresses can be edited later.

Importing Borrows

Once the Patrons and Departments are imported, older DOS QD Borrow Items are imported, matched to the proper Patron and Department from the prior import. The import process also tries to match the Journal Titles from old QD to the Jrnls Table in the new QuickDOC. There will usually be some guessing on Journal Titles, etc.



A typical **BorrImp.txt** file looks like this:

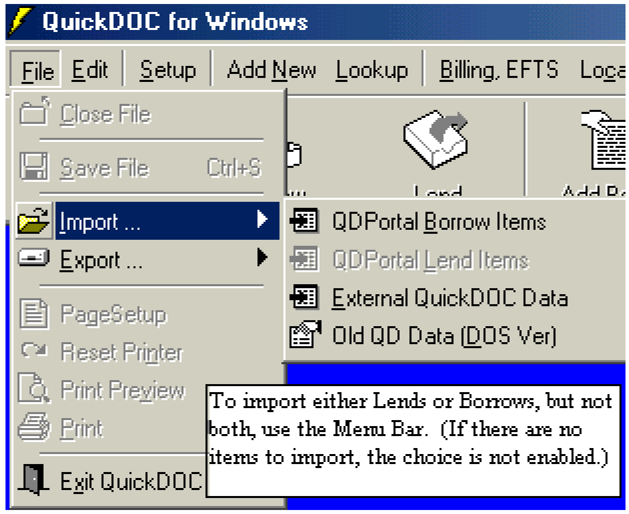


Once Patrons and Departments have been imported, we're ready to do the first import from QDPortal saved items.

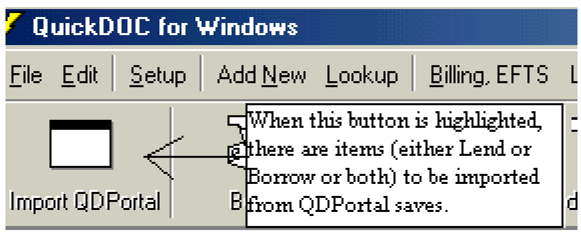
Step Four: Initial Borrow Import from QDPortal Saved Items

QDPortal saves items from DOCLINE sessions in the folder C:\QDBorrow. Unlike the QDLend process, QuickDOC requires some action to begin importing (QDLend did it automatically upon startup). You can use either the File Menu method or the Import QDPortal Button method.

The **Import QDPortal from the File Menu, Import** choice: The File Menu allows you to choose to import just the Borrows or just the Loans. In most cases you'll want both, but this choice is available for the times when it's needed.

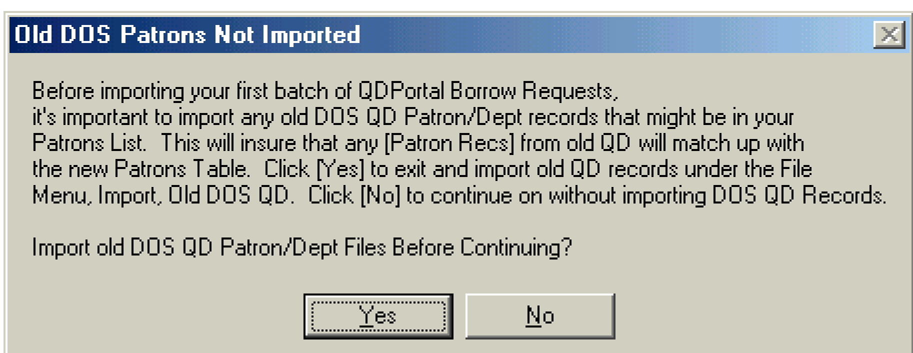


The **Import QDPortal Button** will import items from both the Lend and Borrow saved items. This is the easiest method and most often used. If this button is enabled (not grayed out), then you know that there are some items to import. Just click to begin import.



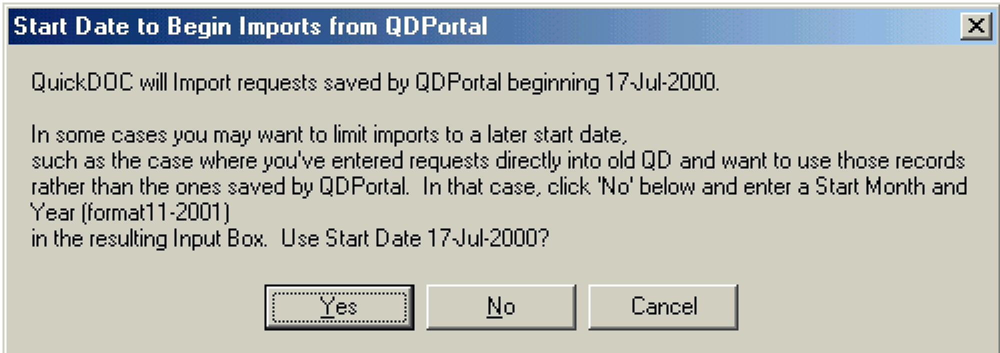
First Borrow Import from QDPortal

The first time you click the Import QDPortal Button (or choose QDPortal Borrow Items from the Import Menu), a few checks are made. If you haven't imported the old DOS QD Patrons file, you'll see a Message Box asking

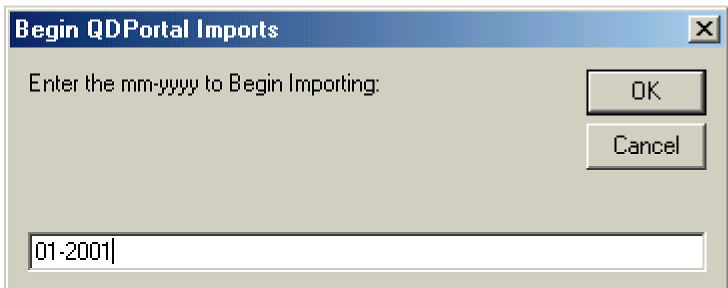


If you don't want to import your old DOS QD Patrons, click No and continue. The Patron match will be a bit less determinate.

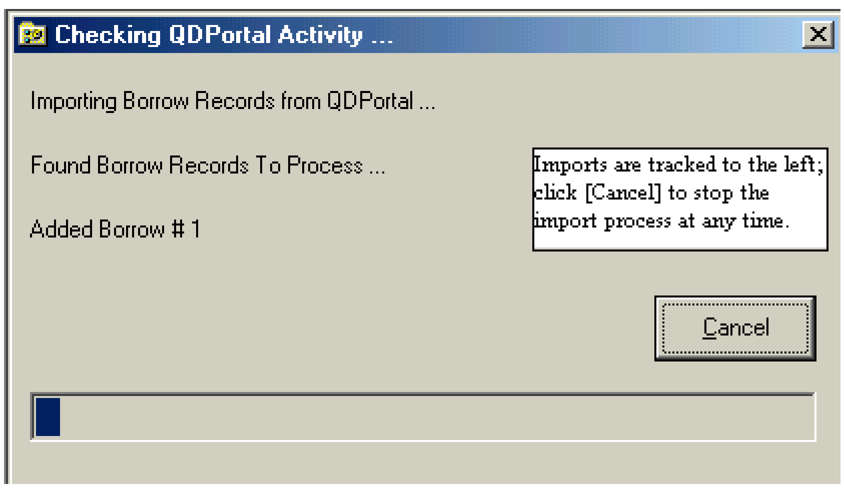
On the first import only, there will be another question: Which date to begin the Import? The default date will be the first new DOCLINE date, July 17, 2000. Use this opportunity to move the start date to a later date if perhaps you've entered new DOCLINE data into old QD and want to use the old QD versions until a certain date when you will use the versions saved in QDPortal.



If the default start date of 17-Jul-2000 is okay, just click Yes. If you click Cancel the process will be cancelled. If you click No you can choose a new Start Date in the Begin QDPortal Imports Start Date input box.

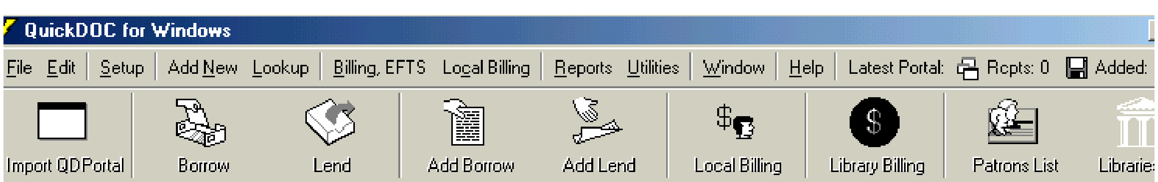


Once the date is settled, the import will begin.



If you want to cancel the import, click the Cancel button; otherwise, let it run through to the end. It may take some time, depending upon how many items you have in your C:\QDBorrow folder, and the speed of your machine (up to a couple of hours for very large, complicated files).

Once the process is finished you'll be back at the blue QuickDOC screen, with the new QuickDOC Toolbar:

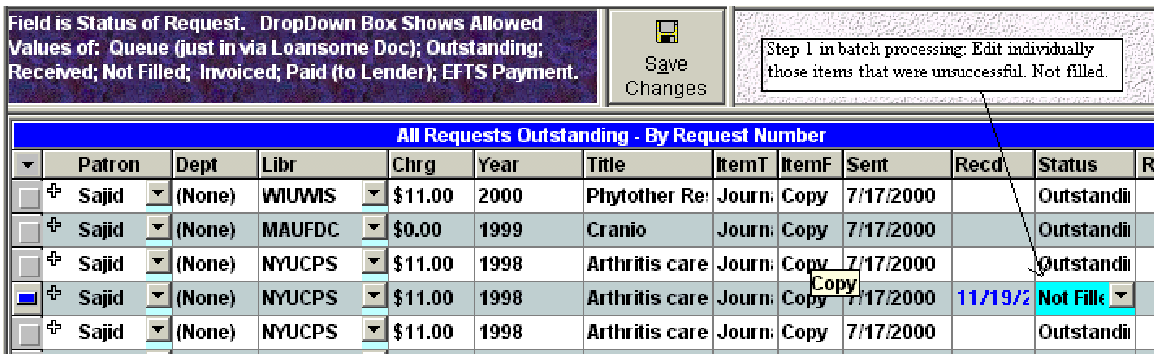


Step Five: Process Unsuccessful Items from QDPortal Import

[Step One in Batch Processing]

Click the “Borrow” button above to get a list of all Outstanding Borrow Items (Cancels and Loansome Doc Not Filleds will have already been processed). The first step in batch processing is to cull out those newly imported items that were NEVER received. These we can mark as **Not Filled** in the Grid.

Use your saved paperwork to process, one by one, those items that were unsuccessful. Outstanding Requests are generally displayed without reference to Start Date and End Date (since, generally, they will always be fairly recent), but you can use search for Request Numbers to bring up the item you want, or just scroll to the appropriate row.

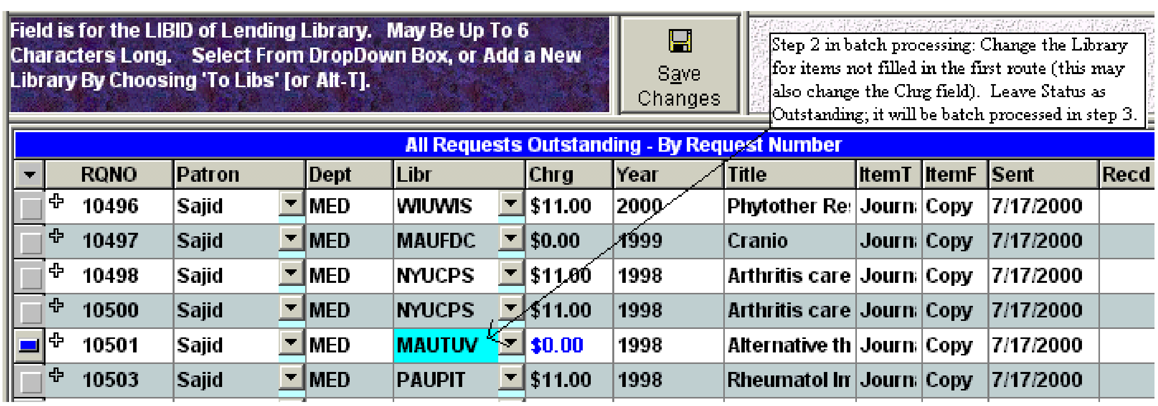


You can also sort by any column in this list to make it easier to find these items. Just click the header above the column you want to sort and choose “Sort Ascending” or “Sort Descending.”

Step Six: Process Received Items with new Lenders in QDPortal Import

[Step Two in Batch Processing]

After all the Unsuccessful Items have been processed, the next batch will be those that were received, but filled by a Library other than the one to which it was first sent (NLM has estimated that about 90% of items sent on DOCLINE are filled on the first route, so this part should be about 10% of your outgoing items, more or less). These need to be processed in the same way the Unsuccessful Items were published, above: one by one.



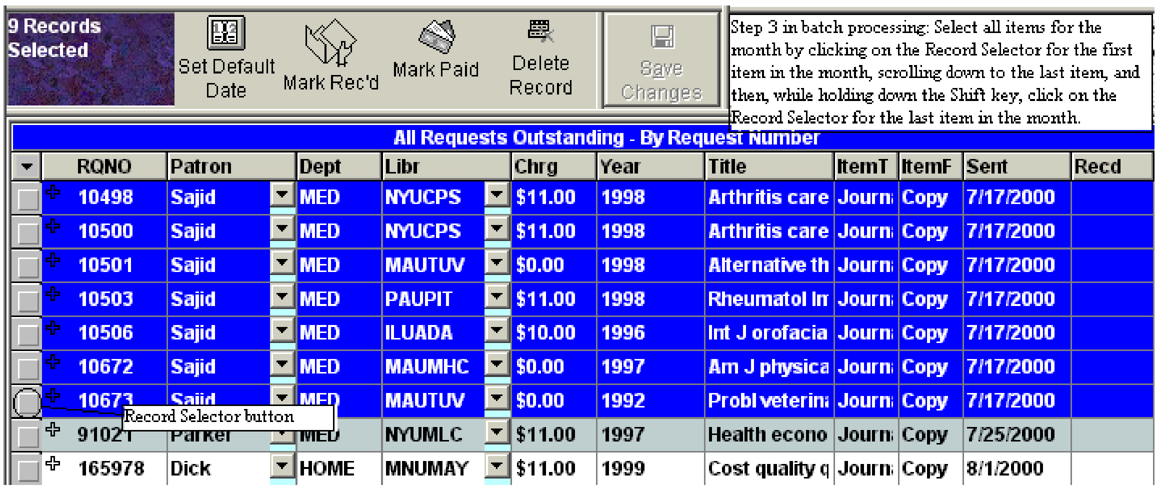
Change the Lender by clicking on the down arrow in the Libr cell and choosing the new Library. Moving to another row or clicking the ‘Save Changes’ button will register the change. You don’t need to mark the item as Received (although you can if you want to, adding the proper Received Date), since you can batch process the item in the next step.

Step Seven: Process All Other QDPortal Import Items to Received

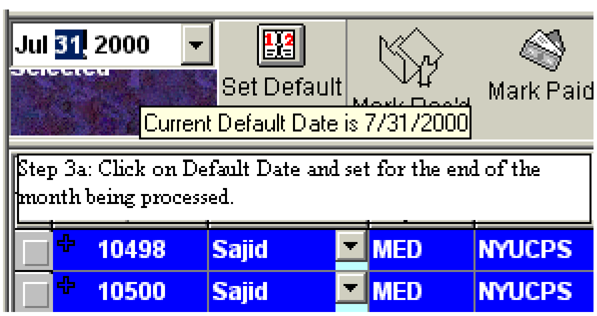
[Step Three in Batch Processing]

Everything else on the list should now be a Received Item, with only the Date Received to be determined. For the purpose of batch processing, you can choose a common date and then batch process any number of items to Received, with that common Received Date.

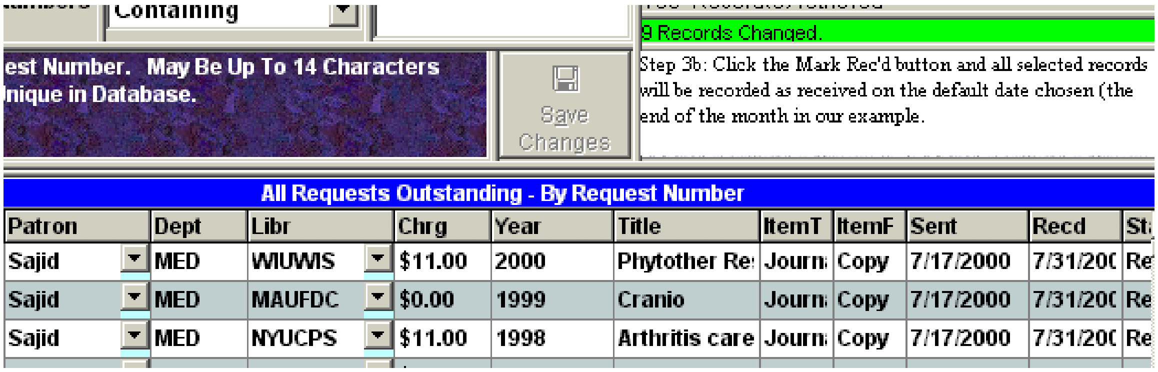
The easiest choice might be to process them month-by-month. If you click the header on the “Sent” column and choose ‘Sort Ascending’ you’ll get the list in order by Date Sent. To select all the July 2000 items, for example, first click the Record Selector (the button in the leftmost column) next to the first row in July. Then scroll down and, while holding down the Shift Key, click the Record Selector next to the last row in that month (or choose a date before the end of the month when a common Received Date will best work). This will select all the items in that month for processing.



Next choose the **Default Process Date** by clicking the ‘Set Default Date’ button. Use the Date Box or the Calendar to choose the Default Process Date.



The current Default Date, by the way, is always available as a Tool Tip if you place the cursor over the button, as above. Once the Date is satisfactory, click the ‘Mark Rec’d’ button to effect the change.



Repeat as necessary for the next month, until we're up to date.

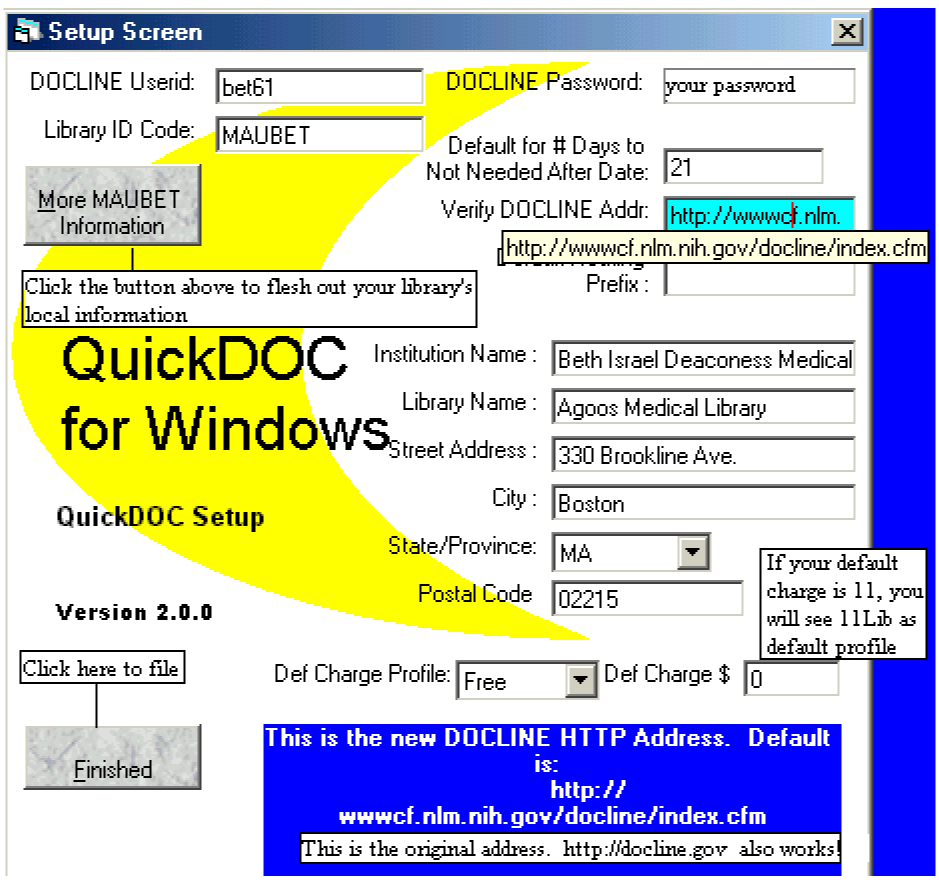
Setup

Setup Program

After locating the database files, on your first running of the QuickDOC Program you'll be brought immediately to the **General Setup Screen**. (If you ever need to change any information later, just choose "General Setup" under the "Setup" Choice on the Menu Bar.)

General Setup

General Data values are entered on the Setup form. Help for data entry is in the Blue box at the bottom of the form.



Press <ENTER> or <TAB> to move from question to question. Click the Finished button when data entry is completed. The first group of boxes may already be filled in if you've been using QDPortal. Questions are as follows:

Enter your **DOCLINE Userid** in the first box. It's usually something like the one above, three letters and two numbers.

Enter your **DOCLINE password**.

You **New DOCLINE LIBID** is usually in the format State/Province (2 letters), Country (1 letter), SERHOLD ID (3 letters), e.g., MAUBET (Beth Israel Deaconess) or ONCCIS (CISTI).

The **Default for # Days** box is to have the QDPortal program calculate a **Default NNA date**, which can then be applied to any request by clicking on the NNA Date button. (Not available for IE4.)

The current **DOCLINE HTTP address** is the default. Preferred default value is now:

wwwcf.nlm.nih.gov/docline/index.cfm

You can change the string here should the value change in the future.

The **Default Routing Prefix** is for libraries that commonly prefix most or many of their requests to a single partner. Enter that library's LIBID here, and then click the RP Button in QDPortal when you want to add this default Routing Prefix. (Not available for IE4.)

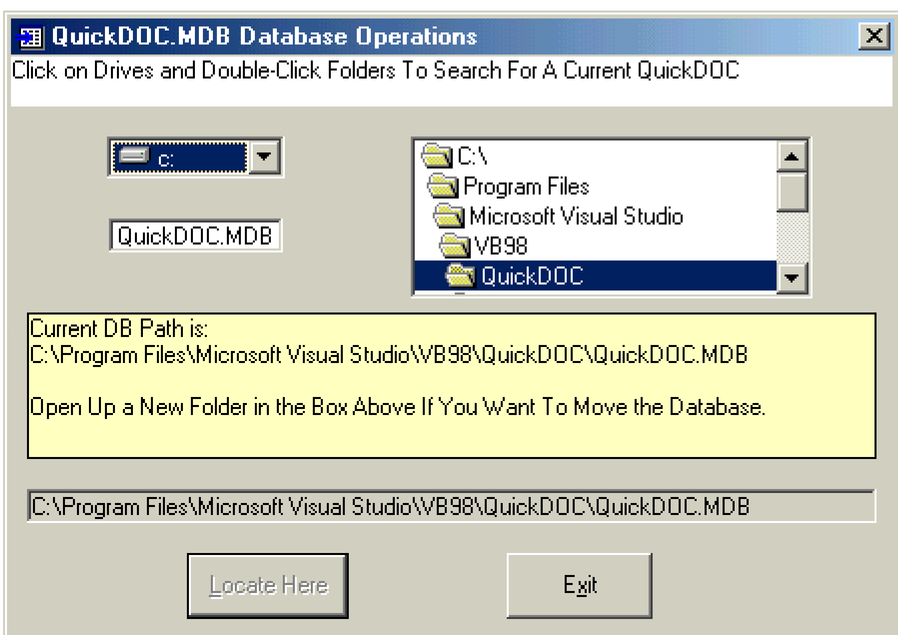
Institution Name, etc., are fairly straightforward.

Default Charge for Import From QDPortal. Enter here your typical charge for the Items that will be automatically imported from the files that were saved (and will continue to be saved) in QDPortal. Choose the most common charge, to minimize editing later (which can be done globally, once the files are imported, to speed the process).

All filled requests will be assigned this charge in the initial import process. Later, you can assign a charge for each Borrower, and that charge will be applied to forthcoming imports, rather than the default charge. In the final QD4Win there are Charge Profiles that will dynamically assign charges, depending upon a variety of factors.

If you normally don't charge, enter 0.00 here. It will then be fairly easy to search by Library for those you do charge and globally change the charge to your current fee.

Locate QuickDOC.MDB



If you're installing on a second machine on the network, use the Drive box to find the Network location, and then the Directory box to locate the centralized QuickDOC.MDB file. When searching for the central data file, each time you double-click on a folder where a QuickDOC.MDB file exists, a message will appear stating that a **QuickDOC.MDB** file was **FOUND HERE**, along with the file information: File Size; Last Accessed, etc., and the "Locate Here" button will be enabled.

Database Version is Different

When performing an installation on a new machine with an updated version that is **greater than the current Database Version**, and if, for whatever reason, you don't get a chance to point to the correct database at the time of installation, you'll get a message box with the warning **Database Version is Different** when you try to move it to the desired location.

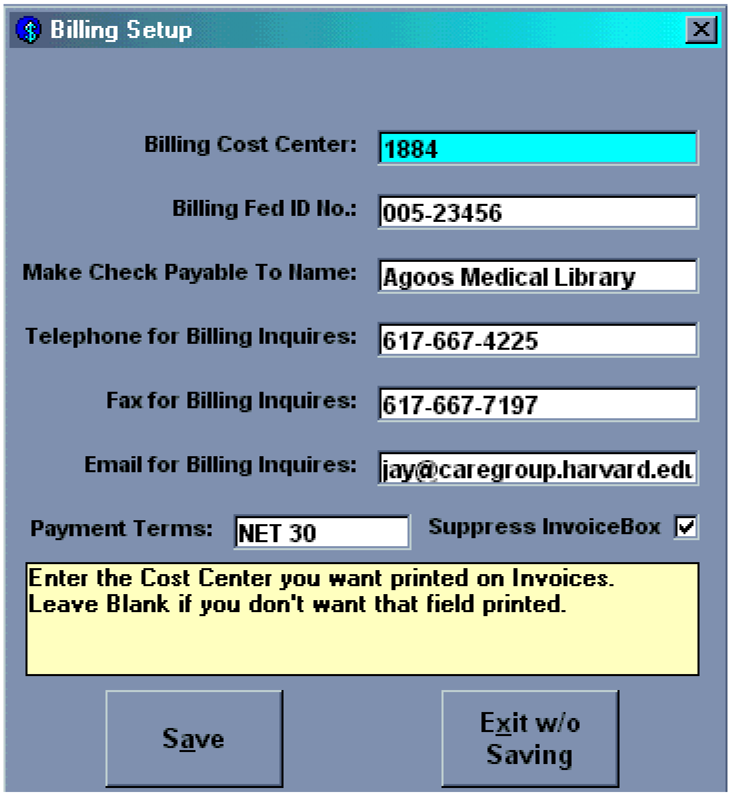
If this occurs, follow the instructions in the message box, which will, in effect, first move the data from the database with the earlier version notation to the current (generally minimal) installation database, and then clear a space on the server where you can move it (newly updated) back to where it was.

Steps are:

1. Use the File Menu, Import choice to choose External QuickDOC Data, and click on the folder with the old version database.
2. When you've found it, click **Import Now**. This moves the old data to the new database format.
3. Use Windows Explorer to delete (or rename, just to be safe) the old QuickDOC.MDB.
4. Use the Setup Menu, Locate QuickDOC DB, to move the database location once again to the desired central location. Since there won't now be a file to update, this operation will be very quick and the database should now show in the Status Bar in the new location.

This situation can be prevented by using this strategy: **First update all computers currently running QuickDOC before installing any newer version on a new computer**.

Billing Setup Form

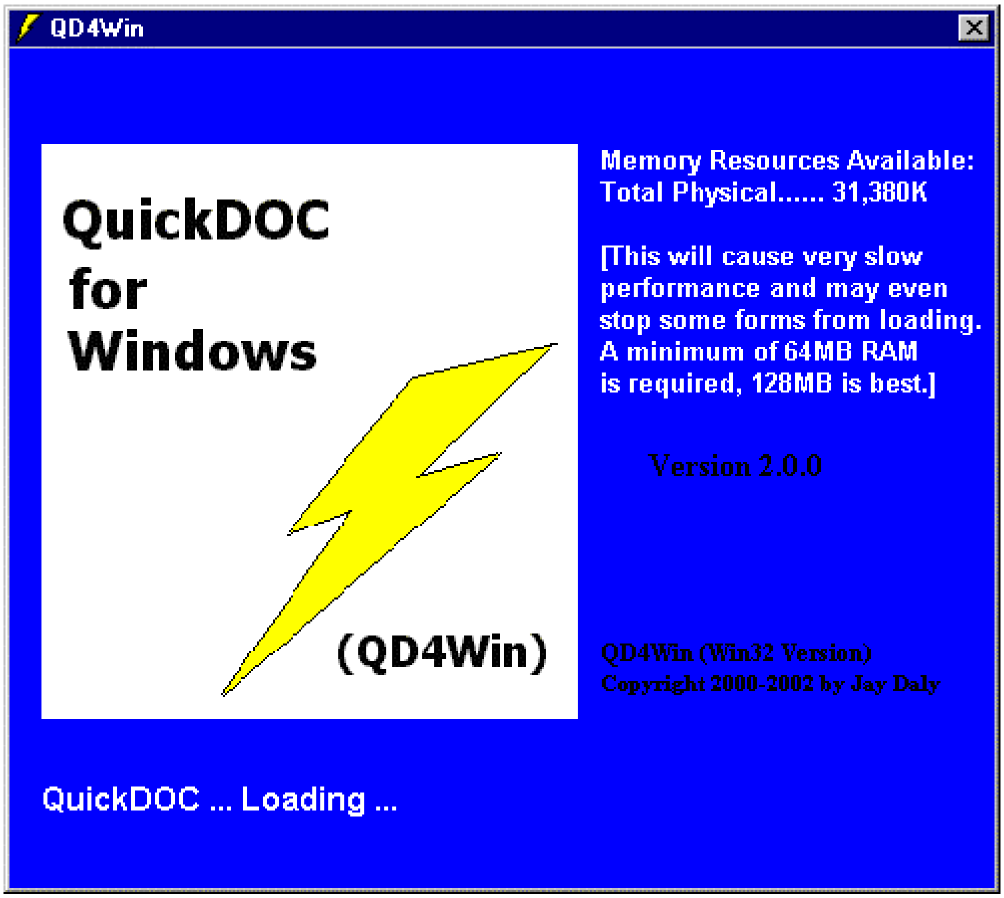


These values are primarily used when printing Invoices, etc. Enter the appropriate values for your institution; the light yellow box below gives some instruction for each value entered. The **Suppress Invoice Box** checkbox, on the lower right, can be checked to suppress printing of the box around the Return Address, etc., that appears at the top of the Invoice and which causes some printers to overwrite that information with a blank box. Check this box to print the information without the surrounding box, if you can't get the graphics set properly as illustrated in **Invoice Troubleshooting**.

Getting Started with QuickDOC

The Splash Screen

Each time you start the QuickDOC Program, you see the Splash Screen display while the program is being loaded and various database tables are being checked.



RAM Memory Requirements

As illustrated above, **insufficient RAM memory is anything under 32MB.** A setup under those conditions will undoubtedly cause problems, including the inability of some QuickDOC forms to load into memory. You'll get an error message when the form tries to load, and the program will be non-functional in any real sense of the word.

If your display shows the **bare minimum RAM memory of 32MB**, you'll also get the message above. In your case, you'll probably be able to load all the forms, etc., but because Windows will be doing a lot of swapping between disk memory and RAM memory, program execution will likely be slow. You'll find a memory upgrade to 128MB RAM will make your day run much smoother.

The **minimum RAM memory for proper program execution is 64MB**; the **recommended RAM memory for best performance is 128MB** or greater.

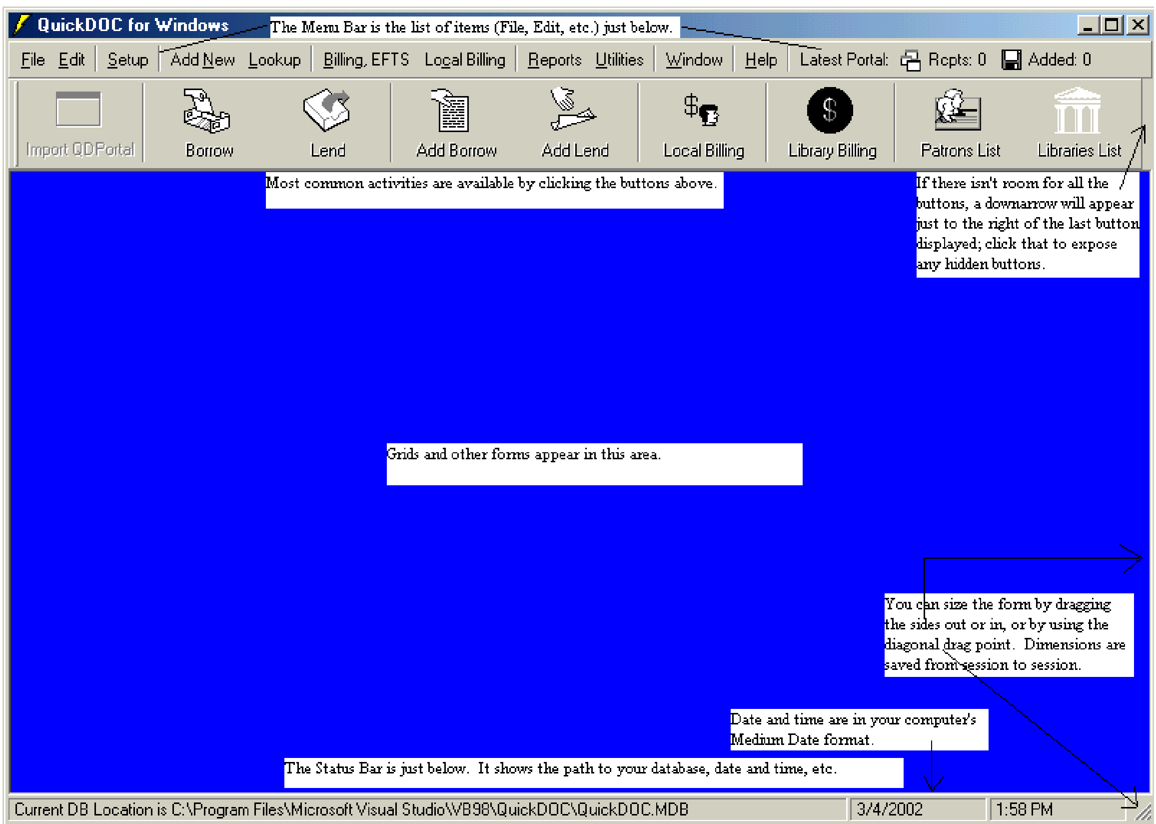
Disk Space Requirements

The QuickDOC.MDB database will grow or shrink based on your level of activity (it can be compressed periodically using Access 2000's Compress Utility) but it will be wise to set aside 25MB for database expansion. The database is usually kept on a server so that it can be backed up periodically, although it can also be kept on the local machine, in the same folder as the program files.

The QuickDOC Program files should be installed on each machine and, with the Help file and other PDF documentation, you will probably need from 50MB to 100MB of free disk space.

The Main Screen

The Main (Blue) screen contains the work area along with the Menu Bar, Tool Bar buttons and Status Bar.



Menu Bar.

The Menu bar provides access to all of the program's forms and activities. Even the forms normally accessed by clicking a button on the Tool Bar are also accessible through a menu choice. Choices are:

File Menu Choices

Close File (Used when editing **EFTS File Uploads**, etc.)

Save File	(Used when editing **EFTS File Uploads**, etc.)
Import	(Shows Import submenu --- See **Imports and Exports**)
Export	(Shows Export submenu --- See **Imports and Exports**)
PageSetup	(Used To **Setup the Printer** for Grid Forms)
ResetPrinter	(To **Reset the Printer** after printer change)
Print Preview	(To **Preview Print jobs** on Grid Forms)
Print	(Used To **Print the current job**)
Exit QuickDOC	(**Exit** the program)

Edit Menu Choices

Undo Delete	(Not currently implemented)
Cut	(Cut selected text)
Copy	(Copy selected text)
Paste	(Paste text copied to Clipboard)

Setup Menu Choices

Setup Form	(The Setup Program form)
Locate QuickDOC DB	(Find or Move the Database)
Billing Setup	(Setup for Library Billing)
Edit Library Charge Profiles	(**Library Charge profiles**)
Edit Local Charge Profiles	(**Patron/Dept Charge profiles**)

Add New Menu Choices

Borrow	(Add a Borrowed Item)
Lend	(Add a Lend Item)
Dept	(Add a Department)
Journal Title	(Add a Journal Title)
Lend Credit	(Credits for EFTS items Uploaded in error)
Patron	(Add a Patron)

Lookup Menu Choices

Depts	(Shows the Departments List)
Items Borrowed	(Shows the Borrow Items Grid)
Items Loaned	(Shows the Lend Items Grid)
Journal Title	(Shows the Edit Journals Form)
Libraries	(Shows the Libraries List)
Patrons	(Shows the Patrons List)

Billing, EFTS Menu Choices

Make New EFTS File (Creates a new EFTS Upload file)

Open Existing EFTS File (Shows a list of files on disk)

Invoices, Print (Print a batch of Invoices)

Trial Invoices, Print (Print a Trial batch)

Payments (Shows the Library Payments form)

Local Billing Menu Choices

Print Patron Bills (Prints Invoices by Patron Charge)

Patron Trial Invoices (Prints a Trial batch)

Print Dept Bills (Prints Invoices by Dept Charge)

Dept Trial Invoices (Prints a Trial batch)

Print Cost Center Report (Prints Cost Center Invoice)

Payments (Shows the Local Payments form)

Reports Menu Choices

Borrowed Items (Shows the form for Borrow Reports)

Loaned Items (Shows the form for Lend Reports)

Utilities Menu Choices

Orphan Update List (Shows when Lend Updates not found)

ResetPrinter (Used To Reset the Printer after printer change)

Window Menu Choices

Tile Horizontally (Tile more than 1 child window)

Tile Vertically (Tile more than 1 child window)

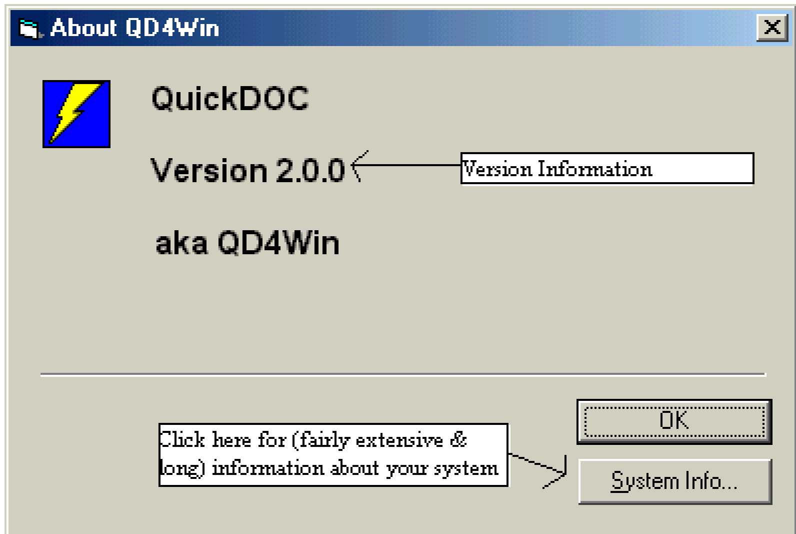
Cascade (Arrange open windows in cascade)

Arrange Icons (Not used at present)

Help Menu Choices

About QuickDOC (Shows version and system information)

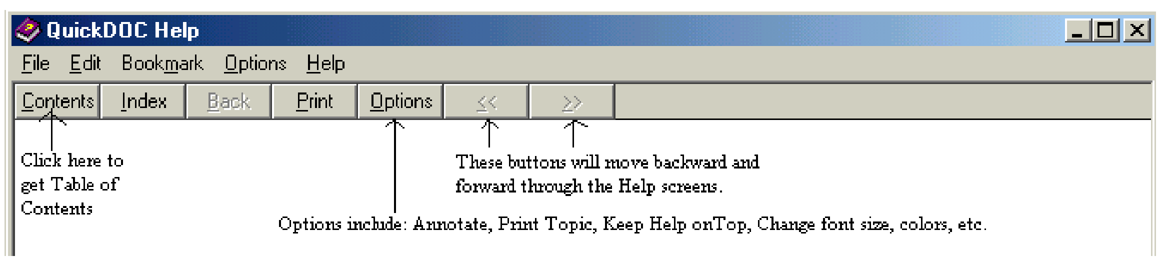
If you click About QuickDOC from the Help menu you'll see a form with information about the **current version of QuickDOC**, as well as a button to provide access to information about your **current system information**.



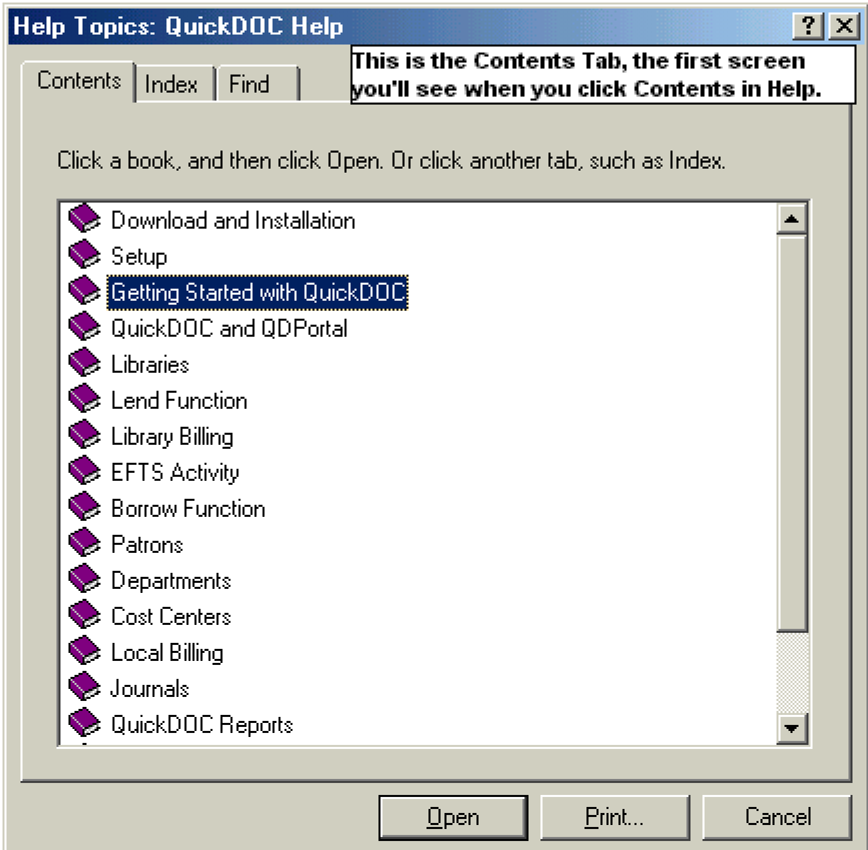
The **version number** is in bold, just under the program name. **System information** is available with the **System Info Button**, which displays system information from Windows. This information is retrieved in a variety of ways, depending upon your operating system (in most cases it will run a file called **MSInfo32.exe**, which is the **Microsoft System Information** program). On some systems this program may take a considerable amount of time to gather up all the information from your system, so it's not something you'll want to run very often.

QuickDOC Help (QD documentation & Help screens)

The QuickDOC Help choice on the Help menu exposes the **QuickDOC.hlp file**, which is a typical Windows Help System. You'll first get the blank Help window, from which choices can be made:



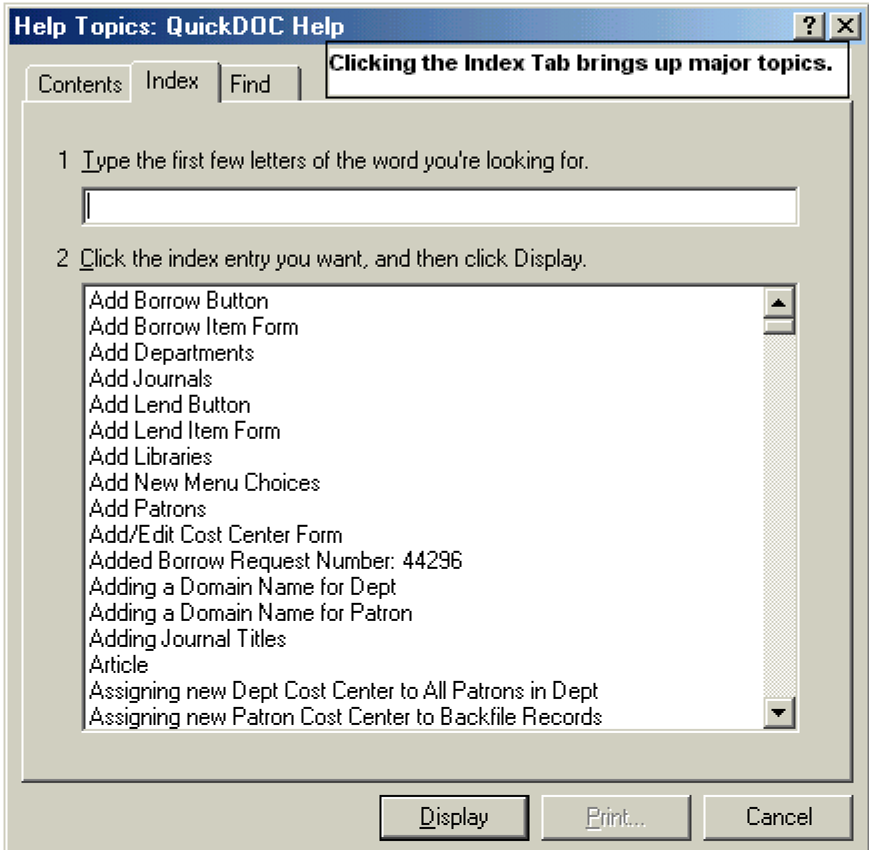
In most cases you'll choose the **Help Contents** button, which will show the **Help Contents Menu**, which will look something like this:



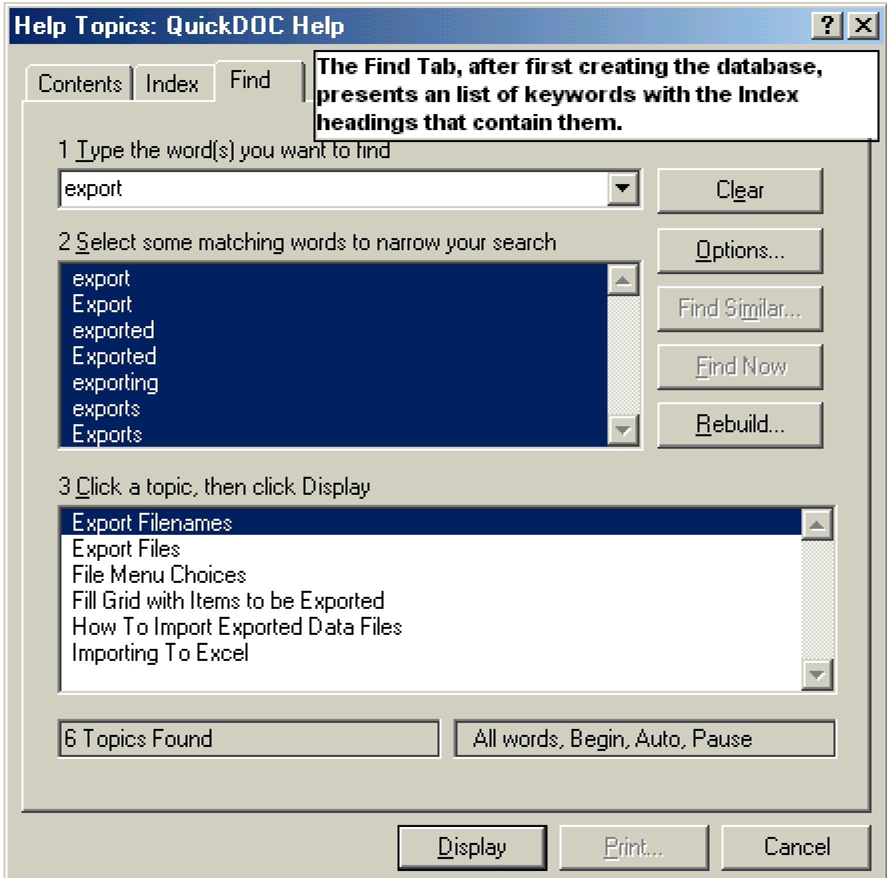
The Index and Find Tabs lead to typical search-by-word Help utilities. Double-click any of the Book Icons to open that book and expose any topics contained therein.

You can **Print a Help Topic** by clicking the Print button (clicking Print above would print the entire "Download and Installation" topic). In most cases, rather than printing an entire topic, you can print a section at a time by highlighting that section before clicking the Print button.

There are also Index and Find choices for searching the Help File.



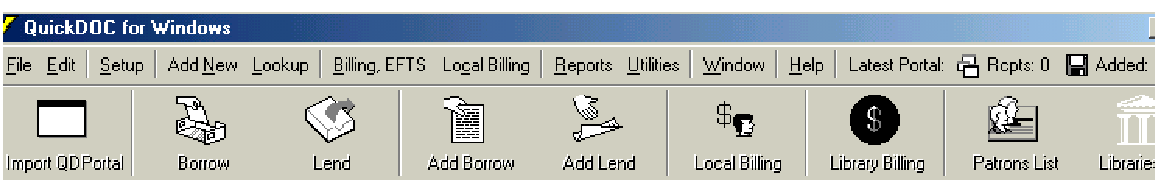
The **Help Index** button will show the **Help Major Topics List**, which looks something like the above:



Clicking the **Help Find Button** will, after generating the database on the first time you choose it, display a list of keywords with the Index Headings under which they are found, as above..

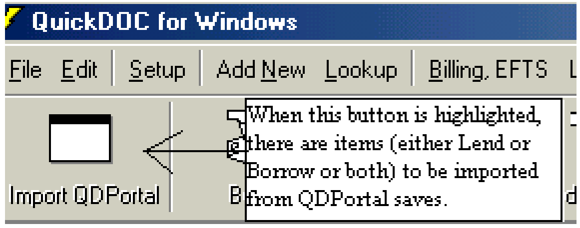
Tool Bar.

The buttons on the QuickDOC Tool Bar provide access to the most used of the program's forms and activities. There are Tool Bar buttons for the following:



Import QDPortal

Clicking this button will import any Lend or Borrow activity that was recorded from your last DOCLINE session. If, for some reason, you just want to import Lend activity and not Borrow, you can choose one or the other from the File Menu under Import. If this button is enabled (not grayed out), then you know that there are some items to import. Just click to begin import. See also **QuickDOC and QDPortal**



Borrow

Clicking this button will bring up the Borrow Grids, which include **Requests Outstanding** and **Borrow Item Backfile**. Always check which one you may be using, since these Grids display different items and will obviously have an effect on whether or not an item you are searching for is available to be displayed on that Grid. The name of the Grid is displayed in the blue bar at the top and is always either Requests Outstanding or Borrow Item Backfile. The first time you open a Borrow Grid in any QuickDOC session, it will default to the Requests Outstanding Grid; thereafter, the default will be the Borrow Items Backfile. There is a **white toggle button** just under the title line that you can use to toggle back and forth between the two Grids. **Go To Outstanding Only** will move you from the Borrow Item Backfile to the Requests Outstanding Grid. **Go to ALL Borrowed Items** will move you from the Requests Outstanding Grid to the Borrow Item Backfile. The Requests Outstanding Grid will generally populate itself upon display, but if it doesn't just click the Search button or press Enter in the white Search Box to fill the Grid with Items Outstanding. You can also get to these Grids by using the Lookup menu on the Menu Bar, and choosing Items Borrowed. See also <u>Borrow Functions.</u>

Lend

Clicking this button will bring up the Lend Grids, which include **Items Received** and **Lend Item Backfile**. Always check which one you may be using, since these Grids display different items and will obviously have an effect on whether or not an item you are searching for is available to be displayed on that Grid. The name of the Grid is displayed in the blue bar at the top and is always either Items Received or Lend Item Backfile. The first time you open a Lend Grid in any QuickDOC session, it will default to the Items Received Grid; thereafter, the default will be the Lend Items Backfile. There is a **white toggle button** just under the title line that you can use to toggle back and forth between the two Grids. **Go To Received Only** will move you from the Lend Item Backfile to the Items Received. **Go to ALL Lend Items** will move you from the Items Received Grid to the Lend Item Backfile. The Items Received Grid will generally populate itself upon display, but if it doesn't just click the Search button or press Enter in the white Search Box to fill the Grid with Items Received. You can also get to these Grids by using the Lookup menu on the Menu Bar, and choosing Items Loaned. See also **Lend Function** for more information.

Add Borrow

This button brings up the Add Borrow Form, which is used to **add non-DOCLINE Borrowed Items** to the database. It can also be used to add manually any DOCLINE item that wasn't, for whatever reason, properly saved from a DOCLINE session.

Add Lend

This button brings up the Add Lend Form, which is used to **add non-DOCLINE Loaned Items** to the database. It can also be used to add manually any DOCLINE item that wasn't, for whatever reason, properly saved from a DOCLINE session. See **Add New Lend Item** for more information.

Local Billing

This button brings up the Local Billing Grid, which is used to manage Patron/Dept Billing. See **Local Billing** for more information.

Library Billing

This button brings up the Library Billing Grid, which is used to manage Invoices, payments and EFTS activity with other Libraries. See **Library Billing** for more information.

Patrons List

This button shows the Patrons List, which is used to access the Edit Patrons Form. This list is also available from the Menu Bar, under LookUp, Patrons. See **Library Billing** for more information.

Libraries List

This button shows the Libraries List, which is used to access the Edit Library Form. This list is also available from the Menu Bar, under LookUp, Libraries. See **Libraries** for more information.

To Expose a Hidden Tool Bar Button:

If any of the above **Tool Bar Buttons are not visible onscreen**, they can be revealed by clicking the Down Arrow that will appear on the far right of the Tool Bar in such an instance.

Tool Bar Button Icons Missing:

Nancy Smith reports a fix for a case where the icons that normally appear on each Tool Bar button are missing and the **Tool Bar Buttons show text only**:

When we installed an earlier version of the new QuickDOC on two fairly new Windows98 Gateway workstations, we were unable to get the Toolbar's Borrow, Lend, etc. icons to display properly under the standard display settings. Only the last 2 icons in the Toolbar displayed with their appropriate graphic -- all the others were a button outline with lines across it.

We were able to "fix" this by changing the Gateways' display settings to 256-colors (from Thousands, or Millions). Making this one change enabled all of the icons to be displayed properly.

Status Bar.

The QuickDOC **Status Bar** appears at the bottom of the screen and shows the complete path to the QuickDOC.MDB database, along with the Current Date (in the Medium Date format used by the machine running the program) and Time.

If you can’t see the Status Bar at the bottom of the screen, it’s probably hidden behind the Windows **Task Bar**. If you’d like to have both the Windows Task Bar and the QuickDOC Status Bar visible, you can **show the QuickDOC Status Bar** by **re-sizing the QuickDOC Main Screen**. First use the vertical scroll bar on the right side of the screen to move all the way to the bottom. Then move the Mouse Pointer until it’s over the horizontal bottom line of QuickDOC (just under the Status Bar) and the cursor shows an up- and down-arrow. Drag the bottom up about a quarter of an inch and then slide the vertical scroll bar back up to see the results. Repeat until both the Status Bar and Windows Task Bar are visible onscreen. Once this is set, it should become the default for future sessions.

QuickDOC and QDPortal

How the QuickDOC Program Interacts with QDPortal

QDPortal Receipts

All RECEIPTs that were accepted using QDPortal are logged to a file **C:\QDLoan\QDPLData.txt** on the C: drive of whichever user was actually receiving the request. Likewise, whenever an item was updated on DOCLINE while the user was in QDPortal, that information was retained also (in filename **LendUpdt.txt**).

To import requests, from either Receipts or Borrows, it is necessary either to click the **Import QDPortal button** or to choose **Import** from the **File Menu**.

QuickDOC then opens any **C:\QDLoan\LendUpdt.txt** it finds, and attempts to update the final disposition of the item in the **QuickDOC.MDB database**. General results of the import are posted on the right end of the Menu Bar, in the following manner:

Tool tips give a brief description of each label. **Latest Portal: Lend** lists the number of Receipts imported into the database from the last QDPortal session. **Latest Portal: Borrow** lists the number of Borrows added in the last Import QDPortal click. These numbers should match the number of printouts you have. If either number doesn't, use the printout to add the missing item using the **Add Borrow** or **Add Lend** button.

In cases where the Receipt was done on one machine, and the update on another, unmatched updates are saved (in either filename **SaveUpdt.txt** or, next step, in **SaveUpd1.txt**), so that when the Receipt that prompted it is finally imported, the update action will be applied during the next session. If the update isn't accomplished in the first three startups, the information is moved to **C:\QDLoan\OrphUpdt.txt**.

QDPortal Receipt Imports also generate various reports on import results, including a report of new Libraries Added (**C:\QDLoan\NewLibNt.txt**) as well as various error reports. More information is available on these in both the **Download and Installation**, and the **QuickDOC Reports** sections.

QDPortal Borrows

All Borrows that were requested using QDPortal are logged to a file **C:\QDBorrow\QDPBData.txt** (or to individual files named after the first request number, e.g., **123456.txt**, if the Full Display button on DOCLINE wasn't clicked) on the C: drive of whichever user was actually receiving the request. Cancels are stored in a file (filename **Cancel.txt**), and Loansome Doc transfers in filename **LDXTrfer.txt**. Loansome Doc items updated on DOCLINE as Filled (from the local collection) or Not Filled (and not transferred onto DOCLINE) are captured in the file **LDXUpdt.txt** and should update the QuickDOC.MDB database the next time the Import QDPortal button is clicked. If this automatic update doesn't occur (as appears to be the case in some situations), these items can be manually edited on the **Requests Outstanding Grid.**

Borrow Imports also generate various reports on import results, including a report of new Patrons Added (**C:\QDBorrow\PatronNt.txt**) and Libraries Added (**C:\QDLoan\NewLibNt.txt**) as well as various error reports. More information is available on these in both the **Download and Installation**, and the **QuickDOC Reports** sections.

Backups of QDPortal Imports

At the time of importing, backup copies of most of the saved text files are directed into a **\BackImp** folder just beneath both **C:\QDBorrow** and **C:\QDLoan**.

Backup copies retain similar names to the files they back up, but with a prefix of whatever the current year might be, so that they can be easily identified and archived or deleted at some future date.

The backup files are (assuming the year is 2001):

Backup File Name	Backs Up	Description
C:\QDBorrow\BackImp\2001BDat.txt	**QDPBData.txt**	(**backup of Full Display imports**)
C:\QDBorrow\BackImp\2001LDX.txt	**QDPLDX.txt**	(**backup of Loansome Doc imports**)
C:\QDBorrow\BackImp\2001SDat.txt	**123456.txt**	(**backup of Short Display imports**)
C:\QDBorrow\BackImp\2001LUpd.txt	**LDXUpdt.txt**	(**backup of Loansome Doc updates**)
C:\QDLoan\BackImp\2001LDat.txt	**QDPLData.txt**	(**backup of Lend Receipt imports**)
C:\QDLoan\BackImp\2001LUpd.txt	**LendUpdt.txt**	(**backup of Lend Update imports**)

The C:\QDBorrow**LDXTrfer.txt** file (which contains the LIBID of the Library to which the Loansome Doc request was transferred on DOCLINE) isn't backed up at this time.

Backup files can be used to re-import data in an emergency. They're the complete ASCII downloads of all DOCLINE transactions. The 2001SDat.txt file can be simply moved up a layer to the C:\QDBorrow folder and the import program will recognize it next time you click the Import button. The same is true for the other filenames mentioned above. It's best to move them, rather than copy them, up, since they will, by definition, re-create themselves in the BackImp folder during the import.

Since the years are there, these files can be purged periodically, but it wouldn't hurt to save them somewhere, just in case.

At the time of the **first Borrow import**, a message box will ask whether you want to begin with the date 17-Jul-2000 (which is the date of the new DOCLINE intro). If you click no, an input form appears where a new date can be entered. Whichever date is chosen, any item with a Sent Date before that date is skipped and the data isn't imported into the database. It's still sent to the backup file, though, so keep that in mind: if in the future you choose to run the backup through again, for any reason, there'll be no date check then! You might want to delete the backup files right after import on the borrow side, so you won't forget.

DOCLINE Receipts Not Updating Automatically in Lend

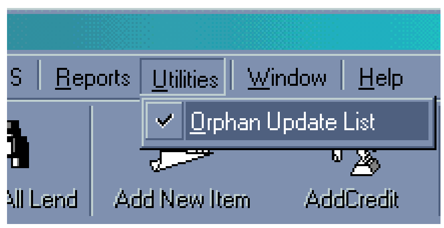
The import process will try three times to update an item marked Received in the Lend Items file to reflect the action taken on DOCLINE. In most cases this will be successful on the first try. If the first try fails, the update is saved in the file C:\QDLoan**SaveUpdt.txt**, from which it will be offered again as an update during the next Import. If this attempt fails, there is one more try, from the file C:\QDLoan**SaveUpd1.txt**. After each unsuccessful update attempt, an entry is made in the file C:\QDLoan**UpdtFail.log**. This **Update Failed Log**, which can be opened using Notepad, can be useful in diagnosing database update problems and bottlenecks. A typical entry might be:

```
Log Update Message after successful Update of ReqNo: 7031315
Fill Date: 28-May-02  Status = N
Update Message saved:
Item Receipt record for 7031315 not found in database.
```

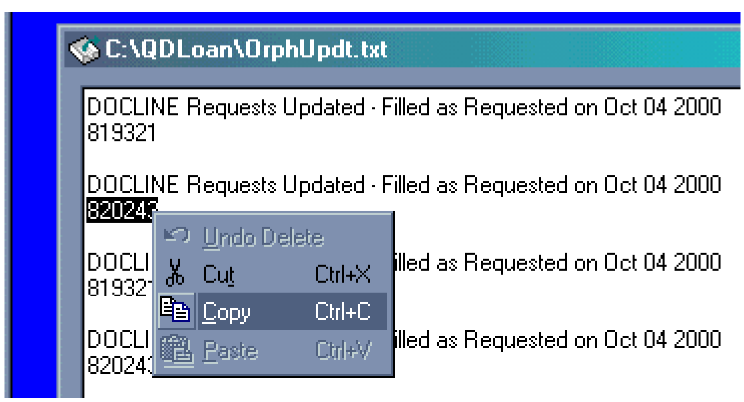
The message above indicates that, for whatever reason, the original Receipt never made it to the database and should probably be entered manually (a re-import using DOCLINE's Status/Cancel function is most often not available for Lends, particularly not for rejected items, as is the case above, where Status = N for Not Filled).

OrphUpdt.txt File

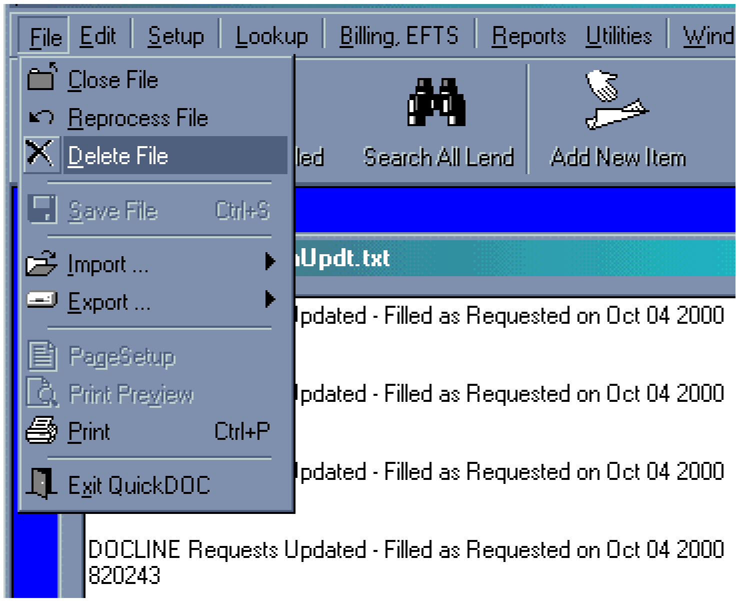
After three tries at automatically updating Lend Item Receipts to Filled or Rejected, items are moved to an Orphan Update file, indicating that you might want to add these requests manually since, by definition, these are items not found in the database and may therefore represent missing items (not imported properly, for whatever reason). You can check for the presence of an **OrphUpdt.txt** file under the **Utilities Menu**.



Clicking on the **Orphan Update List menu choice** loads the file in a Rich Text Box, where it can be edited. It's also possible to copy request numbers from the Orphan Update file and paste them into the Add Lend Item form, although request numbers are short enough that this isn't really necessary:



The Orphan Update List can also be printed, deleted or reprocessed, using the File Menu:



Delete the file when you're finished adding any items that need adding.

Reprocess the Orphan Update File

The **Reprocess File (Orphan Update)** choice basically renames the file back to C:\QDLoan\SaveUpdt.txt, so that it can be run through again, either next time you start up QuickDOC, or directly by choosing **File, Import, QDPortal Saved Items**.

(If, as you consider adding orphaned items, you discover you don't have a copy of the printout, you might also try opening up the backup (C:\QDLoan\BackImp\QDPLData.txt) download file in either Notepad or WordPad and searching for any occurrence of each of the orphaned request numbers in that file, although the odds are that they won't be there if the Receipt wasn't properly recorded, obviously. If you aren't successful there, just set a printed copy of OrphUpdt.txt aside and use it to look up the necessary information when you get the appropriate end-of-quarter report from DOCLINE. It won't have all the information but should have enough to identify the item and Borrower.)

Importing data from other QDPortal Downloads

To **import data that may have been saved on a machine without QuickDOC**, or to run the backup text files back through the import process, use this procedure (this is for Lend imports, but the procedure is the same for Borrows, just substitute the Borrow filenames for the Lend, below):

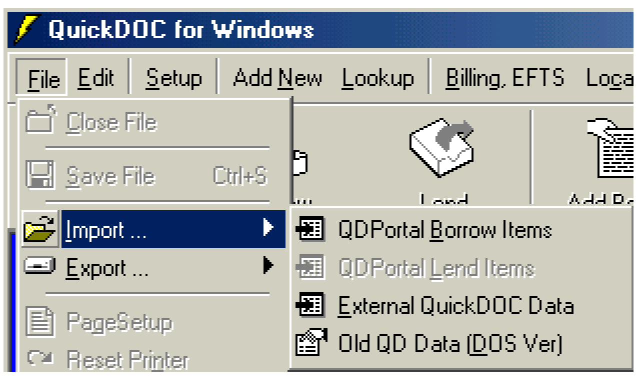
1. First, **ALWAYS** check your current **C:\QDLoan folder** to be sure there are no **QDPLData.txt** or **LendUpdt.txt** files already in there. If either of these files exists, start up QuickDOC to process those first before proceeding.
2. Locate the C:\QDLoan folder on the machine you want to Import From (the Source) and see if it has files named QDPLData.txt or LendUpdt.txt. (If you're running backed up Imports back through the system, you'll ALWAYS find the raw data in those two filenames in folder **C:\QDLoan\BackImp**.)
3. If these files exist in the Source folder, copy them onto disk or over the network into the C:\QDLoan folder on the machine with the QuickDOC.MDB database. Again, **MAKE SURE THERE'S NO CURRENT QDPLData.txt (or LendUpdt.txt) FILE ALREADY IN THERE, OR YOU'LL OVERWRITE IT**. (If you're running the

C:\QDLoan\BackImp files through again, you can **MOVE** them up to the C:\QDLoan folder, rather than copying them, since the process will result in their being saved again back to the C:\QDLoan\BackImp folder as they're processed. If you copy the files, they'll be added again at the end of the original, resulting in a much larger file, with unnecessary duplication.)

4. **Start up QuickDOC** and click the Import from QDPortal button. This will cause the program to look in C:\QDLoan for a QDPLData.txt file and, finding it, suck the data into the db. The SaveUpdt.txt file (which may be a reprocessed OrphUpdt.txt file) will then find any new records added, update the records, and disappear (assuming they're all found - if not, then use 'Add Lend Item' to add them).

You can also initiate an **Import from the QuickDOC Menu Bar**, to perform this action at any time. This will be the preferred method in situations where both QDPortal and QuickDOC are running at the same time. You can click over to QDPortal to get receipts, and once the Receipts have been acknowledged on DOCLINE, click back over to QuickDOC, open the **File Menu**, click "**Import**" and then click either "**QDPortal Borrow Items**" or "**QDPortal Lend Items**" to bring them right into the database.

The same can be done right after doing a Lend Update on DOCLINE, to register action taken immediately to the database.



'Lost' Records in QDPortal Imports

Here's a question posed on QuickDOC-L:

```
-----Original Message-----

Back in august'02 we switched over from qdportal to qdwin. Since the switch to the
windows version, all current activity has been fine. Our problem is we have gaps in time
where numerous records are missing. Some of the missing records are as current as July'02
and some date back to 2001. When we run lend grids for those time periods we get a "no
records found" message and the same occurs when trying the individual docline request
number. We have gone back and re-installed all the records that did not make the transfer
from qd portal to qdwin and were located in the orphan file. At this point we are unable
to determine what has happened.

--------------------------
```

In general, when you find a **gap in QuickDOC.MDB records** such as you describe, above, it usually means that the records captured by QDPortal were saved on a machine that:

1. Was never upgraded to QuickDOC or
2. Was updated but saved the data to a different QuickDOC.MDB.

3. On the Lend side, there's also the possibility that one machine or another went back to using QDLend after installing QuickDOC and that a bunch of items were saved to a QDLend.MDB during that period.

Because the QDPortal-captured data makes an interim stop in the C:\QDLoan (or C:\QDBorrow) folder on each machine where it's running, it provides a kind of audit trail for all items captured.

With #1, above, if you find a machine that has a C:\QDLoan\QDPLData.txt file but has never updated to QuickDOC, then there's your culprit.

With #2, if you find a QuickDOC.MDB somewhere other than where it should be, this might have the data, but if it's located in the QD Program folder then most likely it is just an initial db that was later incorporated into the real db. One way to check is to look of a file called **QDMoved** in the same folder: if you find it, open it with Notepad and it'll tell you where it moved. If you don't find it, use the File, Import, External QuickDOC DB choice to import the data just in case. Since the db won't accept duplicate info, you have nothing to lose by running it through.

If #3 seems a possibility, do the same as #2 using QDLend.MDB as the database to look for. Import using File, Import, Old QDLend Tables. Again, it won't import duplicates but will run through and import any unique records.

The final step in the audit trail is in the BackImp folder under both C:\QDBorrow and C:\QDLoan. Using the list of backup files noted above, you can track the chronological capture of QDPortal data saved from DOCLINE, and can run the saved data back through the import process, if necessary.

Before running them through again, you can open them with WordPad and check to see if there are items in there for the period you are missing. If so, then it might be easier just to cut and paste the relevant section into a new C:\QDLoan\QDPLData.txt and import only that than to run the entire 2002 year, most of which we already have.

If none of these methods locates the missing batch, then they must have been captured and saved on a machine whose files were somehow deleted or overwritten for that period, and there's really no recovering from that except through paper records, if you have them.

This should be a one-time problem, though, since current and future items are monitored and imported as they arrive, and database files are backed up regularly (we hope).

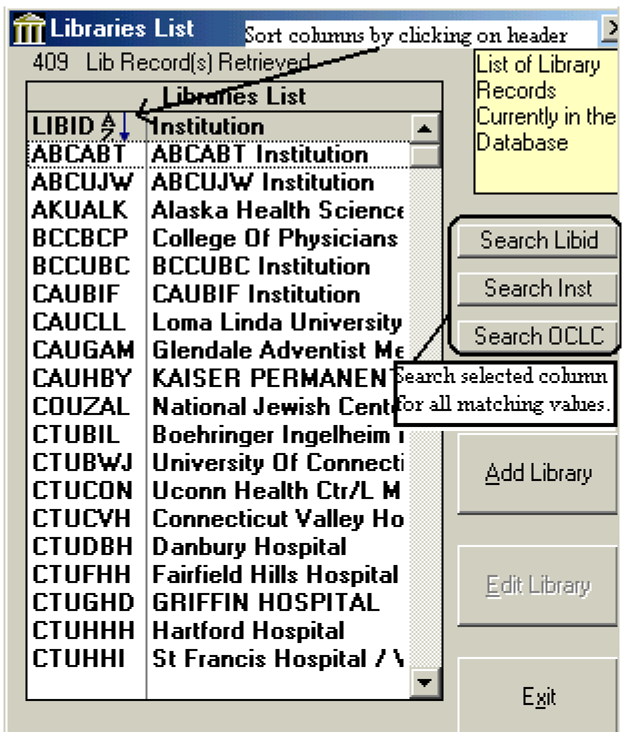
Libraries

Records for Libraries are held in the QuickDOC.MDB database primarily in the **tblLibs** Table, with associated records in **tblLComms**, **tblLibCharges**, **tblLibPmtTypes**, **tblLibsGroups** and **tblLibsOldSHID**. Lists of Library records are available in a column on all Grids, as well as through the Libraries List.

The Libraries List

Displaying Libraries

Records for Borrowing Libraries are primarily accessed through the **Libraries List** (on the Toolbar) as well as under "**Lookup**" on the **Menu Bar**, under Libraries. The Libraries List also pops up in other places, such as when you're adding a new Loaned Item, so that the Library can be chosen from the list.



The list shows the libraries in your file alphabetically **by LIBID**, which is the default sort order. Start typing the first few letters of the LIBID to jump ahead on the list, or use either the Down Arrow key or the scroll bar at the right of the list to navigate further. (**XXX… LIBIDs**, by the way, result from imports from old QD for a Library not found in DOCUSER; these can be assigned a standard DOCLINE LIBID later, should that become necessary, or the LIBID can be cast in standard DOCLINE format, once it's determined that that value is not assigned to a true DOCLINE Library.). If you hold the cursor over a long entry, the tool tip will appear with the full name visible.

As an item is selected (either by clicking on that line or by pressing Enter after moving down the list until the library you want is highlighted), the **Edit Library Button** is enabled (to switch from Edit Library to Add Library, click '**Clear Choice**'; the List will then be set to the topmost entry and the **Add Library Button** will be enabled).

Searching for a Library

You can search the Libraries List for specific matching entries by clicking on one of the search buttons. You can search the LIBID column (which should always match the NLM LIBID if there is one), the Institution column, and the OCLC Code column. When you click the appropriate button, an input box will pop up. Enter any amount of characters you want matched and the list will then display only those records where that matching group appears anywhere in the field.

To choose or edit a Library, click on the line that contains the entry you want: the **'Edit Library' Button** will be enabled and that Library will be your current choice.

To **reset the Libraries List** after a search to its full number of entries, click once on any item in the list to highlight it, and then click the Clear button or click the header at the top of the LIBID column to start the sort on that column.

Sorting the Libraries List

You can sort the Institution or LIBID columns in ascending or descending order by clicking on the header at the top of the column.

Deleting Libraries

Click the Edit Library button to bring up the complete Library Form, and then click the **Delete Library button** on the lower right of the General Tab.

Editing Libraries

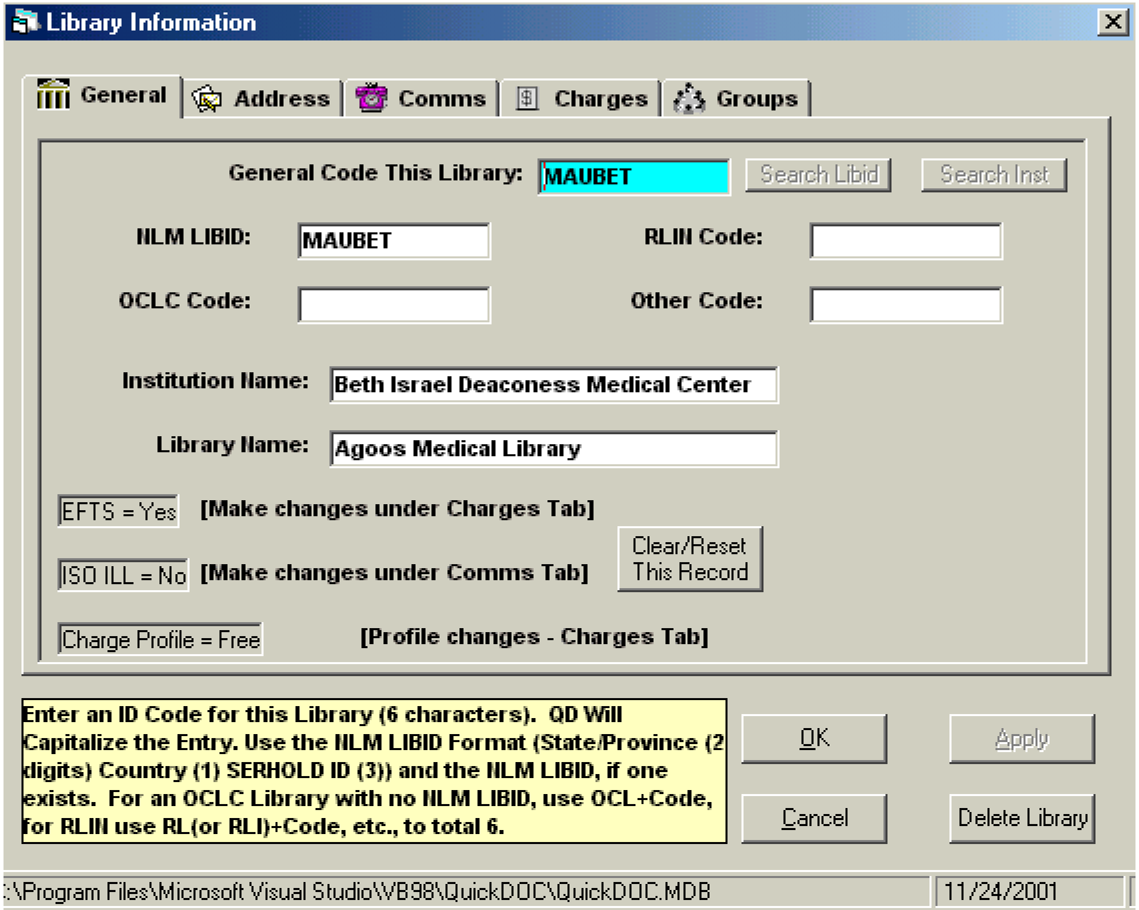
Click the Edit Library button to bring up the **Library Information Form**. .   Double-clicking a line is the equivalent of selecting it and clicking the Edit Library Button, and will also open the Library Information Form.

Library Information Form

The Library Information Form consists of five tabbed forms, located by clicking on the Tabs at the top of the form or by pressing Enter (or the Down Arrow) in the last control on the previous form, except on the Groups Tab, which is the last Tab visible. Pressing an Up Arrow from the topmost control of any form except the General Tab will move back to the previous Tab.

Library Information Form – General Tab

The General Tab presents general Library information, along with a snapshot of values set on other Tabs:



The **General Code for This Library** and the **NLM LIBID** should be the same. Check DOCUSER to see if the Library for which you are creating a record has a **DOCUSER Code**. DOCUSER is searchable in DOCLINE. Most libraries that have had activity with the National Library of Medicine will have DOCUSER Codes, even if they are not, and never will be, DOCLINE users. If the Library you are creating has no DOCUSER entry, you can create a General Code. Use six characters and try to avoid anything that might be an actual DOCUSER entry (NLM LIBIDs use the state or province abbreviation for the first two letters, then one letter for country, then three letters for the SERHOLD ID).

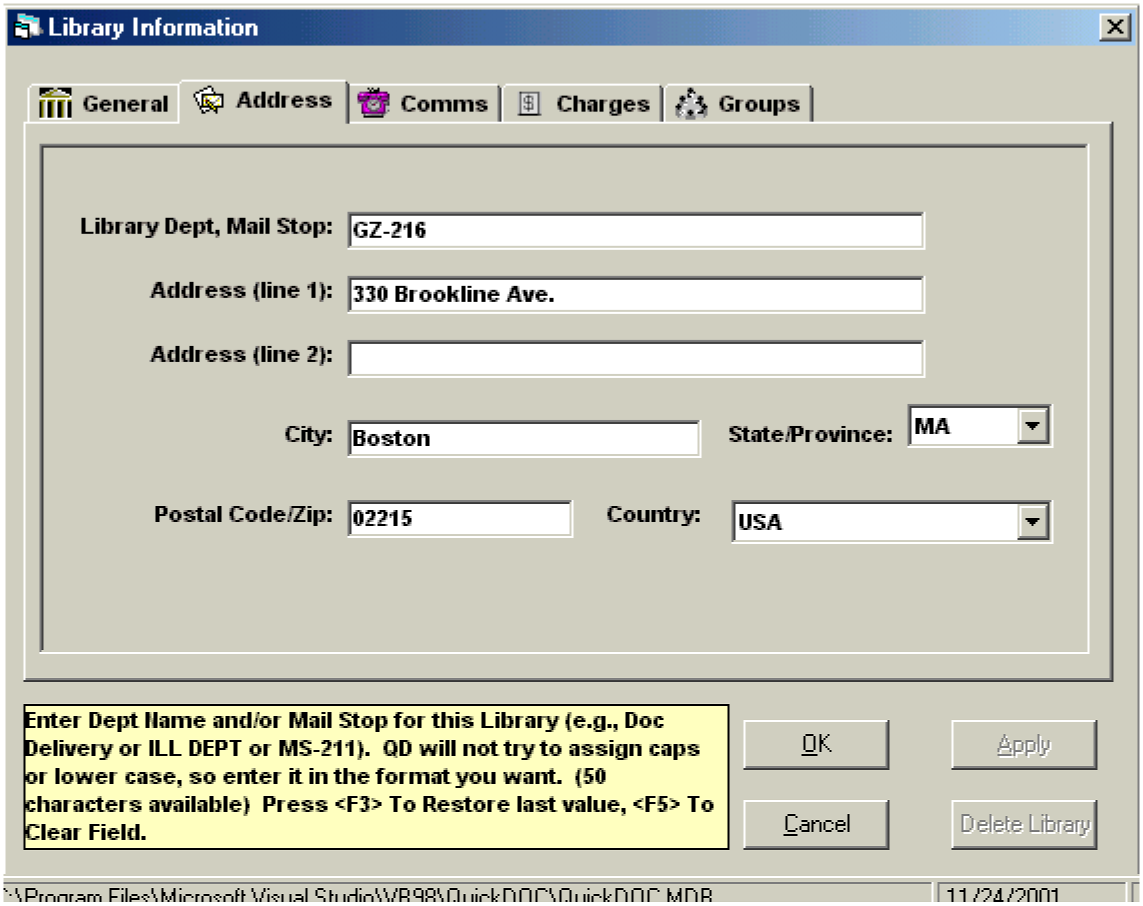
The **RLIN Code** box is for Libraries that are members of that system. The **OCLC Code** box is for users of that system. And the **Other (Library) Code** box is for some other local designation. Any of these boxes (except for the General Code) can be left blank of they don't apply.

Add values for **Institution Name** and **Library Name** here, if needed. The EFTS, ISO and Charge Profile information displayed on the first Tab is to permit quick lookups without moving to a distinct Tab. If you want to make a change to these values, move to the Tab specified.

Clicking the **Clear/Reset This Record on the Edit Library Form** will blank out the entries for the current Library and prepare for adding a new Library.

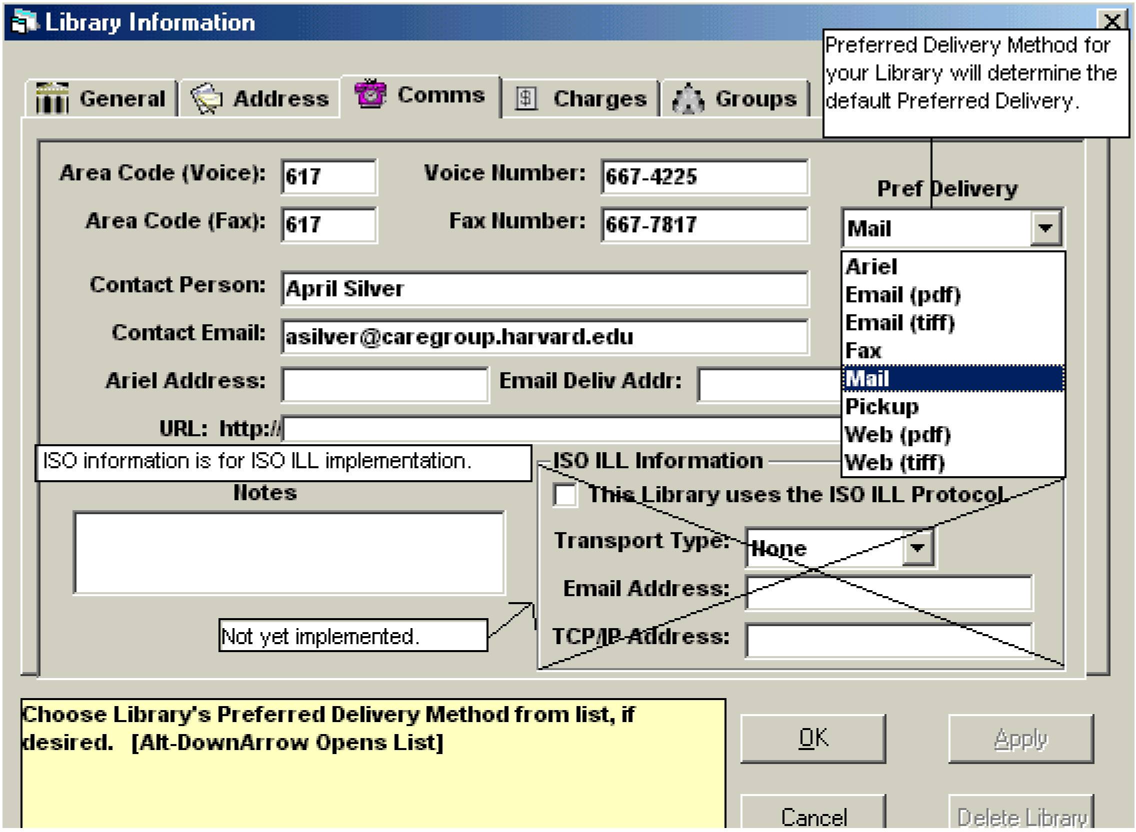
Library Information Form – Address Tab

The Address Tab contains local address information. Most of these fields are self-explanatory. This should have been transferred from QDLend, for those who have moved from that program, but check to be sure the Address values were parsed out properly.



Library Information Form – Comms Tab

The Comms Tab has local communications information. The phone, fax and email values are those imported from a DOCLINE request, where available.



The Preferred Delivery you choose here will also function as the **Default Preferred Delivery Method**. The fields in the ISO ILL Information box aren't used until the ISO ILL Implementation.

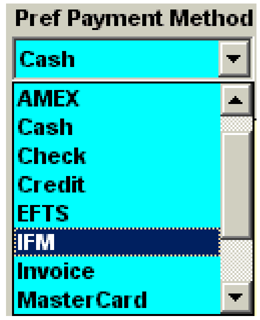
Library Information Form – Charges Tab

The Charges Tab contains information about charges and payment options. Most of the information kept here is for libraries other than your own, but **the Charge Profile you select in the record for your own library** will function as the **Default Library Charge Profile** that is applied to newly created libraries**.**

This information is stored in **tblLibPmtTypes** in QuickDOC.MDB and is associated with the main Libs Table by a matching LibrID field (it matches the Library General Code). The matching field name is **LibPmtLibrID**. There is also an unrelated unique key field, **LibPmtID**, which will allow for multiple Library Preferred Payment records at some later date.

Library Charge Profiles determine the default charge that is applied on initial filing of activity, both Borrow and Loan, with another library (although the default can, of course, be changed on any individual item). Charge Profiles must be assigned to each Library (they will otherwise be assigned the Default) and are filed with the library record.

Preferred Payment Method is the method by which this Library normally prefers to pay. It reveals a dropdown Combo Box with whatever values are in the **Payment Methods** (**tblPmtMethods**) Table of QuickDOC.MDB.



This value can also be left blank (you should see an empty value at the top of the dropdown list when it's first opened) as opposed to the usual (None) value, so long as the empty record is also present in tblPmtMethods (don't delete it by accident or design). The field name is **LibPmtMethod** and allows 20 characters.

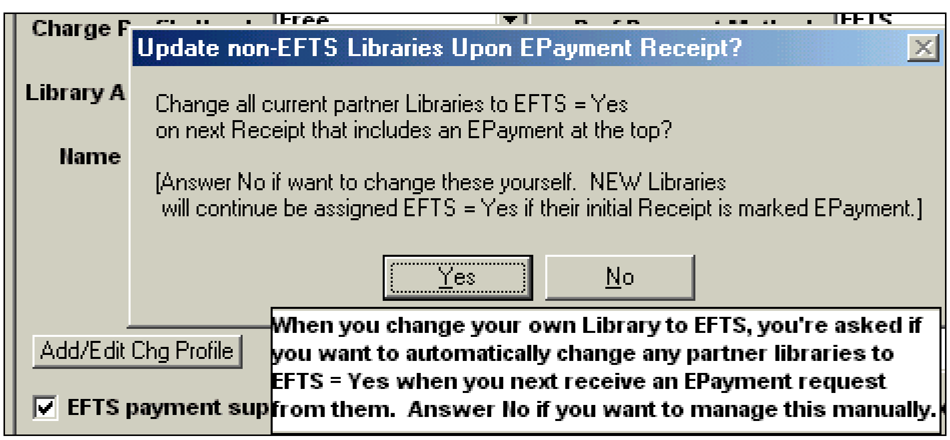
Your own Library's **Preferred Payment Method** combo box will also set the **Default Library Payment Method**, which is used as the default when creating new Libraries on the fly. The Preferred Payment method assigned to other libraries will be used to determine how they are billed. In general, though, items marked **EFTS = Yes** will be billed through EFTS, items marked **IFM = Yes** will be billed through IFM, and anything else will be eligible for Invoicing.

The **EFTS payment supported** should always be checked for your own Library if you want the incoming Receipts from other libraries to show the EFTS status when they come in marked "**Epayment**." If this box is left unchecked, then no incoming Receipts will be marked automatically as EFTS. It should also be checked in the record of each Library participating in EFTS. If you uncheck this box in any library record, that library's items will show **EFTS = No** even if they arrive with the proper "Epayment" notation at the top.

AutoUpdate EFTS Choice

In version 2.1.0 and earlier, once you indicated that your library was an EFTS user by checking **the EFTS Payment Supported checkbox** on the **Charges Tab** of **<u>your</u>** library record, QuickDOC would automatically change the EFTS value to Yes for any Library whose request comes in to you with an **Epayment** notation at the top. The rationale here was that this would be a time-saver for newly-joining EFTS members: they could check their own checkbox and then have other EFTS members in effect update themselves during their next Receipt.

This caused problems, however, for Libraries who had special Billing arrangements with other libraries that were also EFTS members. These records kept being changed back to **EFTS = Yes** when they wanted it kept at **EFTS = No**. Version 2.1.1 now presents a Message Box choice when you change your own EFTS value to Yes:



Answering No here will **suppress that EFTS check for Library records on Receipt of a request marked Epayment**. Only **newly-created Library records** will automatically record the Library as EFTS = Yes if the first Receipt from that Library is an Epayment.

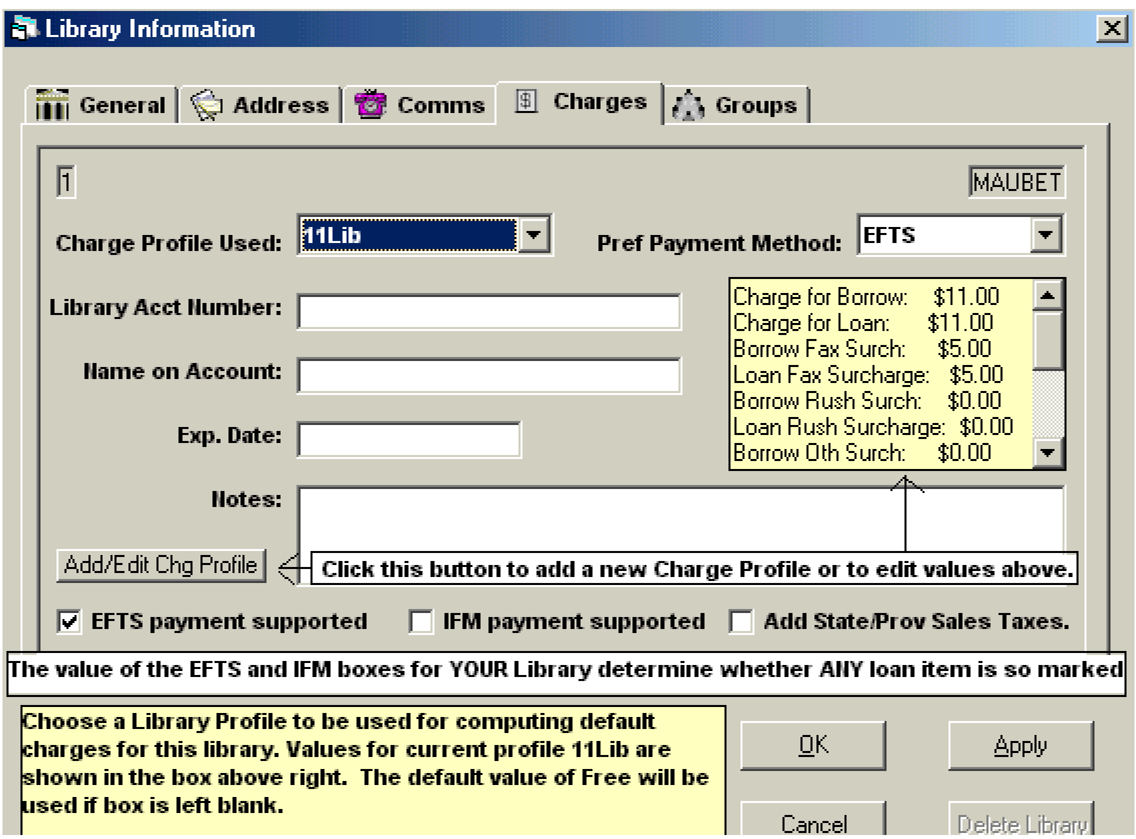
Most libraries will leave it as yes, but if you want to suppress this update, and your library record already has the EFTS box checked, uncheck it and click Apply to first set yourself as EFTS = No, then check it and click Apply again to get the box above.

If your Library's EFTS payment supported box is unchecked, then the **EFTS column** in all **Lend Grids** will be **hidden by default**.

The **IFM payment supported** checkbox for your library determines whether any item will be **marked IFM = Yes**. If your IFM = Yes, and the Borrowing Library's IFM = Yes, then all Lends to that Library will default to Yes. A library may have both EFTS and IFM checked, but since only the EFTS transactions are automatic, any payments made with IFM should be processed first, before creating the EFTS Upload file.

If your Library's IFM payment supported box is unchecked, then the **IFM column** in all **Lend Grids** will be **hidden by default**.

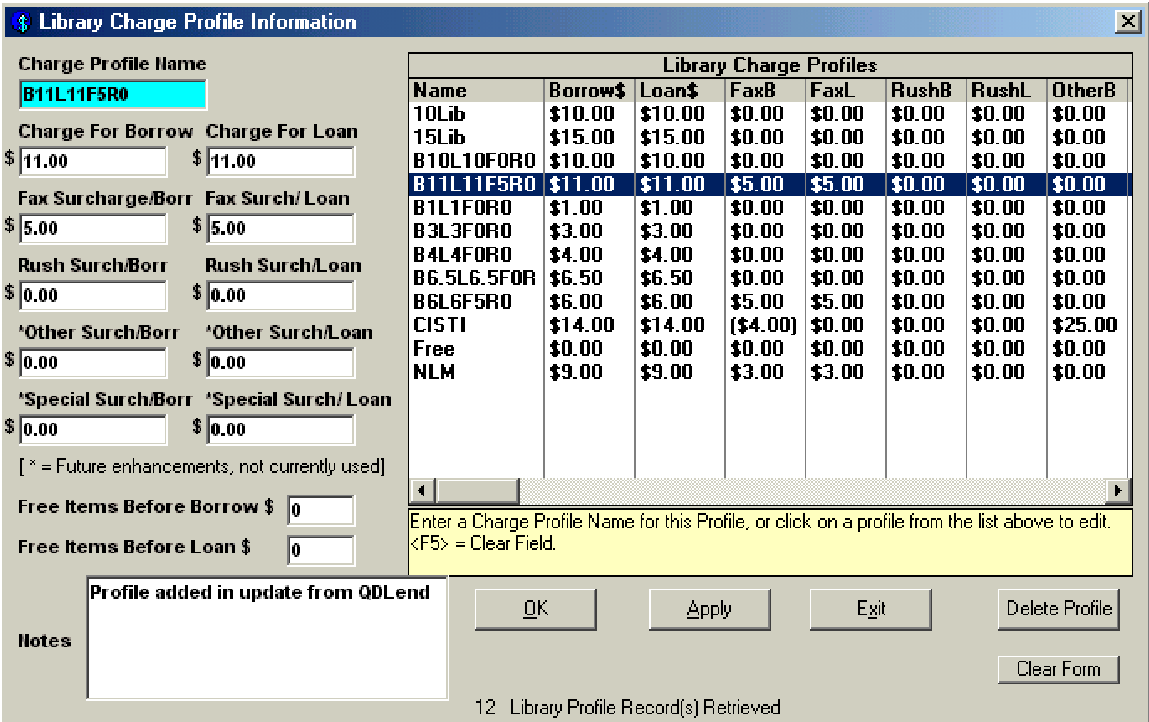
If an item is marked either <u>EFTS = Yes</u> or <u>IFM = Yes</u> in the Lend Item backfile, it is skipped during automatic Invoice creation. See the Library Billing chapter for more information.



The **State/Province Sales Tax** box isn't implemented yet and will have no effect.

To **edit or add a Library Charge Profile from the Library Information form**, click the **Add/Edit Chg Profile button** to bring up the **Library Charge Profile Information** form.

Library Charge Profile Information Form

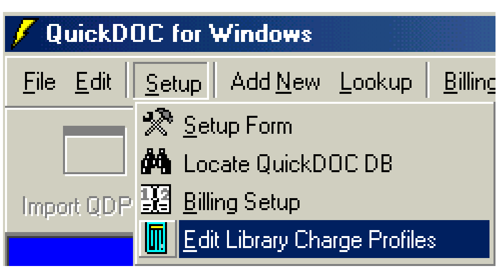


Library Charge Profiles can be named in any fashion that makes the most sense locally. In the case above, the name is an abbreviation for the main values contained in the profile: $11 to borrow from this library; $11 to be charged for loans to this library; a **Fax Surcharge** of $5 for both Borrows and Loans, and nothing in the **Rush Surcharge** value. Each Profile may also have a **Free Items Before Borrow (or Loan) Charge begins**, which QuickDOC computes on the fly, adding the base charge only after the free items total has been reached (currently set on a Calendar Year basis, but a Fiscal Year setting will be forthcoming). There are Other and Special surcharge boxes, but these are reserved for future enhancements.

To **Add a Charge Profile**, first click the Clear Form button to clear out any old values, then begin typing in the new Charge Profile's values. Once a Charge Profile is created, it must then be assigned to individual Libraries whose charges match that profile. In most cases, a profile can be applied to a number of libraries, so that when you change your charges at any point, making the changes here will cause them to apply to any library with that Charge Profile in future activity.

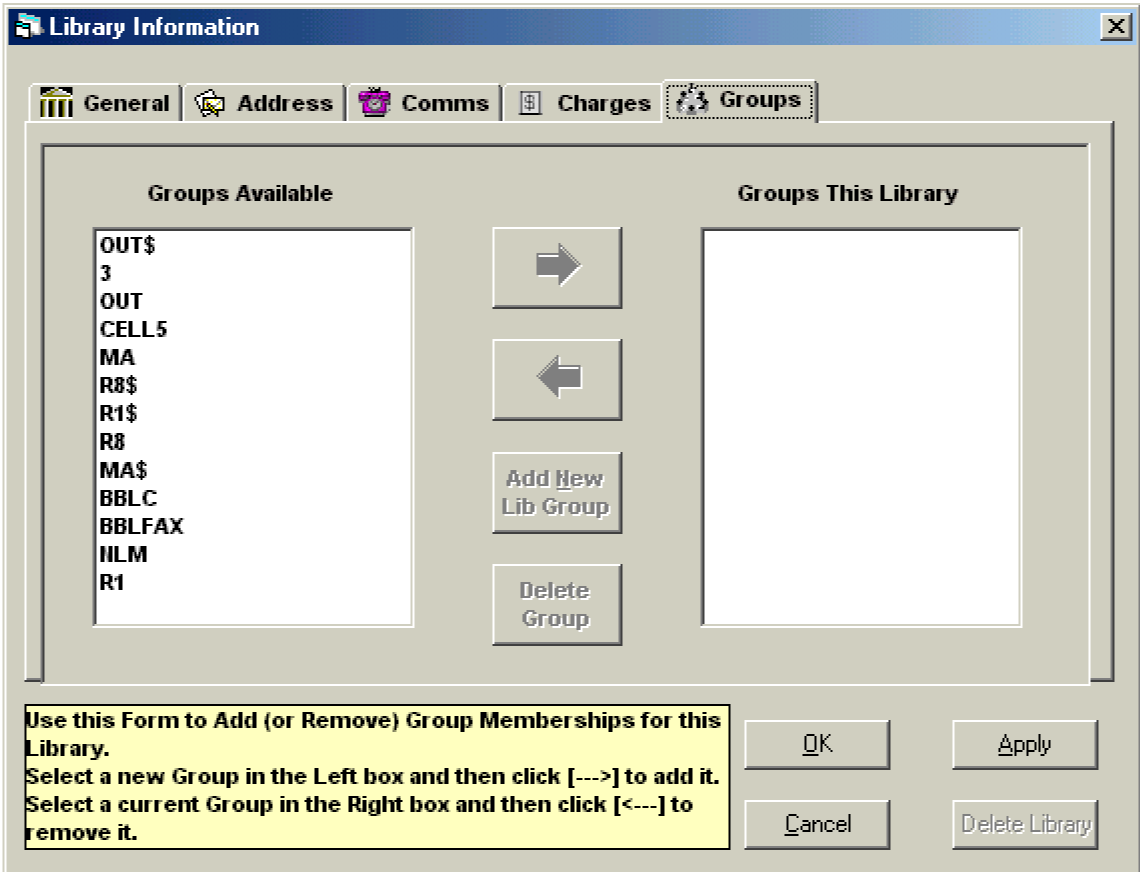
There may nevertheless be cases where a Library's Charge Profile is applicable to that Library only. In those cases, you might just name that profile after that Library's LibID, but don't forget to assign it in the Library record, on the Charges Tab, as well.

You can also **edit or add a Library Charge Profile from the Setup Menu**:



Library Information Form – Groups Tab

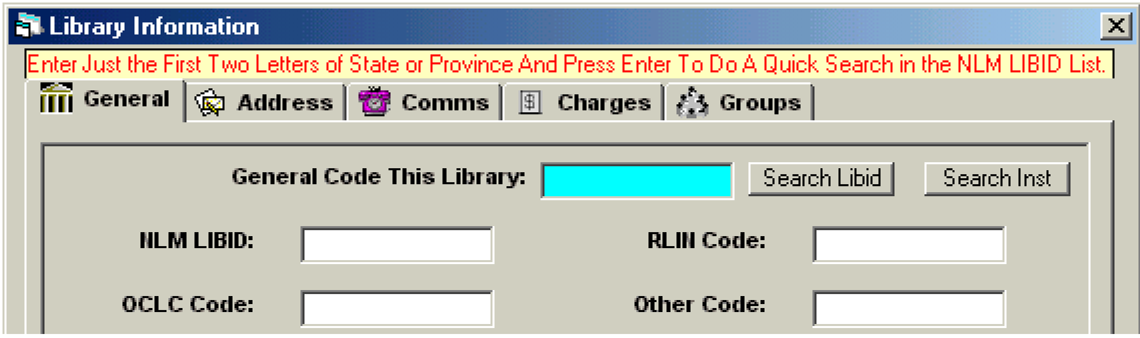
This Tab is used in other Library records to assign various Groups (called General and Special in old QD). You can add this library to a Group by clicking on the Group in the box to the left and then clicking the right arrow to move it over. New Groups can also be added here.



Add Libraries

The Add Libraries form is the same as the Edit Libraries form, except for the **DOCUSER lookup capability built into the LIBID text box.** If you type in just the first two letters of the state or province of the Library whose record you want to create, you'll get a list of records from DOCUSER that begin with that state or province. The list is sorted in order by Institution Name, so you may need to scroll down, and perhaps try a different name if your first choice isn't found. Grab the right edge of the form and stretch it out if you want to see more of the Institution Name. There may also be two entries for a single institution in those cases where they have more than one entry in the **DOCUSER List**, but this quick lookup should be helpful in most cases.

You can also do a search on the DOCUSER List, using any part of the LIBID or Institution Name, by clicking the appropriate search button.



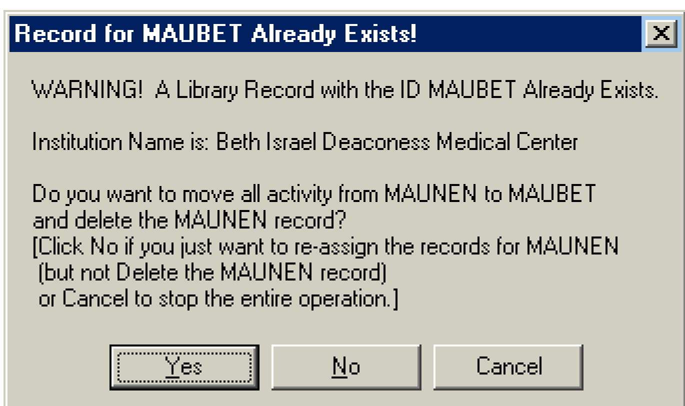
When adding a new Library record, **use the NLM LIBID as the General Code when that is possible** (the library has a record in the NLM DOCUSER file). You can also double-check the current DOCUSER file on DOCLINE to get the latest information.

Standardizing on the NLM LIBID as the General Code will prevent confusion in the future, should you begin receiving requests from that Library on DOCLINE. When it receives that first item on DOCLINE, QuickDOC will create a new Library Record under that LIBID (assuming it doesn't yet exist). This would give you two records for that library if you had used another code for the General Code. To recover from this duplication, you can transfer activity from the old Library record to the new one.

Transferring Library Activity

To transfer activity from one library record to another, use the following steps:

1. Compare the old Library record to the new, adding any unique data from the old record to the new record on the appropriate Tab.
2. Edit the old record, changing the General Code field to match the new code and pressing Enter.
3. A message box will appear (as illustrated here for a transfer from MAUNEN to MAUBET):



4. Click Yes if you want to move all activity in the database now assigned to MAUNEN to the MAUBET record and delete the MAUNEN record.
5. Click No if you want to move all activity in the database now assigned to MAUNEN to the MAUBET record but keep the MAUNEN record for future use.
6. Click Cancel to back out of the entire deal.

If you choose either 4 or 5, above, all the activity assigned to MAUNEN in any table within QuickDOC.MDB will be assigned to MAUBET. This is a quick way to **Merge Library Records**.

Printing a List of Libraries

Although there's no built-in **Libraries List Report**, it's possible to construct one of your own in the following way:

1. Click Lend (or Borrow) and search the Lend Item (or Borrow Item) Backfile for ANY value (it doesn't matter, as long as SOMETHING shows up in the Grid).

2. Then click File on the Menu Bar, then Export. This will export whatever values you selected in Lend (or Borrow), but Export will also ALWAYS export the complete Libraries Table into a file called **Libs.txt** in the Export folder just beneath wherever your database is located.

3. You can then import this .txt file into Excel (or other program) and decide then how to format the fields, which fields to include or exclude, and how to print it.

Lend Function

Lend Information in the Database

Information on items loaned is held primarily in the **tblLendItems** Table in QuickDOC.MDB. Associated bibliographic information for any item is held in the **tblLendBibs** Table. Information on Lend activity is displayed in a Grid format, available by clicking the **Lend button on the Main Tool Bar** or by clicking Lookup on the Menu Bar and choosing **Items Loaned**.

Date Format Used in Searching

In order to evaluate dates uniformly, QuickDOC uses a Short Date format based on the Regional Settings of the machine on which it is being run (e.g., 23-Sep-2001 will display as 09/23/2001 in English – U.S. format; as 23/09/2001 in English – Canada format, etc.). Dates displayed in most cases will use this format.

(Because of an idiosyncracy of SQL Queries on Access-type databases, all SQL Search Dates are re-formatted to English – U.S. for search purposes only, but this will have no effect on the local format used or on the format displayed in QuickDOC. It will be transparent to the user.)

Dates displayed in **Calendar Date Boxes** for data entry will use the Month Day, Year format (e.g., Sep 23, 2001) so as to skirt the date format issue entirely. These controls have some degree of built-in intelligence, so that when you begin typing the month name it will often complete all three letters if there is only one possibility---as in Sep, above). You can check the local settings for your machine in the Control Panel, under **Regional Settings**.

Lend Grids

Lists of items requested are normally displayed in Grid format, showing either current requests received and in process or those requests that have already been processed and either filled or rejected (the Backfile), according to whatever limits are set. Searches can be limited by Date and by choices on the ribbon bars. The **Items Received Grid** is normally the first one shown, but you can toggle back and forth between Items Received and the **Lend Item Backfile Grid** by clicking the ribbon button with the white background just above the Search Box. In addition, multiple deletes and global column changes can be accomplished on any of the Grid views**. Search Dates** selected are displayed (in local date format) in the box just above the Grid to the right, as well as in a Tool Tip when the mouse is held over the **By Dates button**.

Request Number Searching in Lend

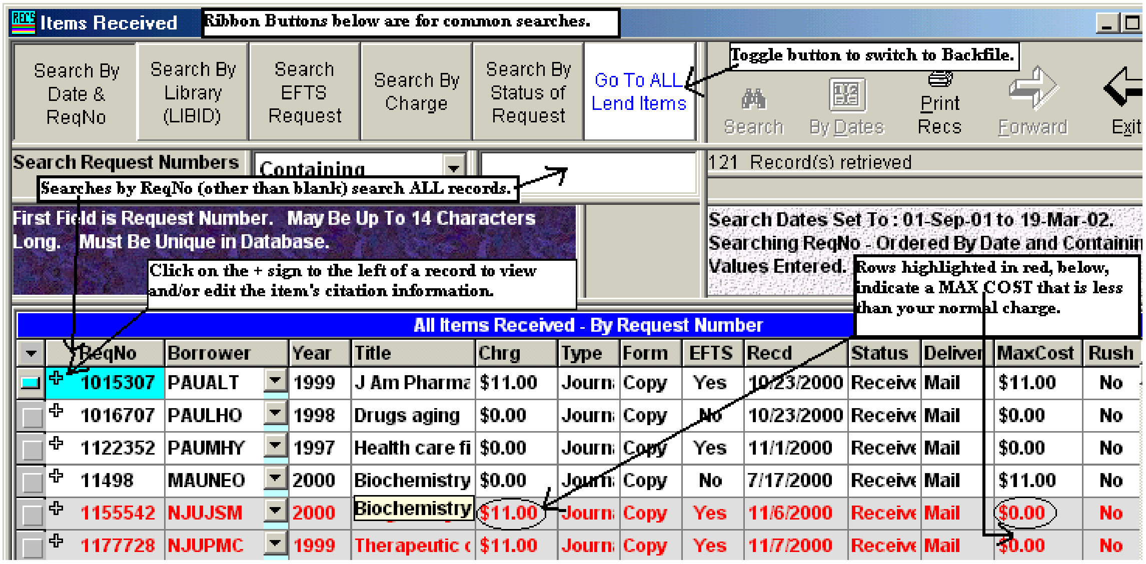
In all **Request Number searches**, whether made on the Items Received Grid or the Lend Item Backfile Grid, if a part of the request number is entered in the Text Search Box (the box next to "Containing" below), then ALL records meeting the search criterion are retrieved.

If the Text Search Box is left blank, then ALL Received Items will appear in the Items Received Grid, and ALL Items for the selected Date Range will appear in the Backfile Grid. This broad-based response is unique to Request Number searching; all other searches are limited by the criteria of the Grid used and by the range of Dates Selected.

An exception to the 'All Dates' rule for Request Number is made for searches where there is something entered in the Search Box and the **Search Criterion** is **Beginning With**; **Beginning With Request Number Searches** will adhere to the **Dates currently set for searches**. This is intended to permit the searching of various non-DOCLINE items, entered manually with all request numbers beginning with a certain phrase or letter, within the Dates specified. (E.g., if you enter all WEST CAMPUS items with a number beginning with WEST, they will be retrieved in a Date Search properly with a search strategy of '**Beginning With**' WEST.)

Items Received Grid

All items that have not yet been acted upon will appear in the Received Items Grid.



The Items Received Grid will be **the first Lend Grid to appear during each session**. This is to ensure that the items still marked as 'In Process' are given at least a brief glance during each session. Rows where the **MAX COST is less than CHRG** will be highlighted in red. A dropdown box with ALL Libraries in your Libs Table is available in the Borrower Column by clicking the down button (for some reason it takes three clicks the first time to drop the list down, but only one thereafter). Fields with data that may be wider than the width of the column they reside in will show the complete field information as a Tool Tip when you move the Mouse Pointer over that cell (as in "Biochemistry" above).

Unlike the demonstration case above, the **Items Received Grid should show ONLY current requests not yet processed**. Once an item is updated, either on DOCLINE or manually, it will disappear from this listing and be available in the Lend Item Backfile Grid. If an item stays here more than a day or two after it's been updated on DOCLINE, then the update action may have been lost. In that case, record the update action here by manually changing the Status value to "Filled" (or "Not Filled" for a rejected request). The Received Date column should never have a value older than a few days before.

You can toggle back and forth between these two Grids using the Ribbon Button with the white background and blue letters. In the above Grid, clicking the "**Go to ALL Lend Items**" button will switch to the Lend Item Backfile Grid.

Borrowing Library Charges – How and when are they computed?

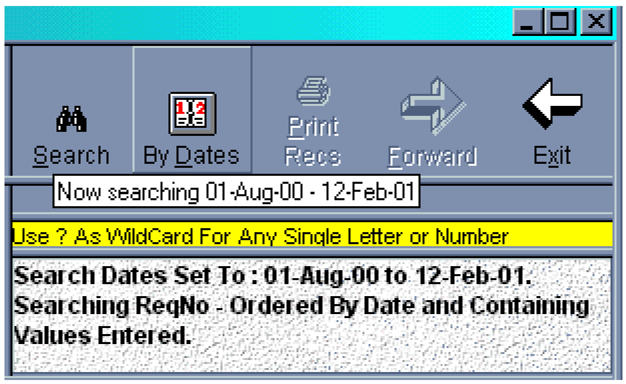
The charge assigned to the item is calculated, based on the **Library Charge Profile** of the Library sending the request, on first import into Items Received. It isn't automatically re-calculated thereafter unless either the **Delivery Method** or **Rush** value changes. If you change a Library's Charge Profile, the new designation will take effect only on new requests; existing charges will be unchanged.

But even existing item charges will be determined by the new profile if any of the signal values (Delivery Method or Rush) are changed, causing a re-calculation using the new Charge Profile.

You can test this by changing a Library's Charge Profile, then changing the Delivery Method on one of that Library's items, saving changes and then changing the Delivery Method back to its original value. The new charge profile will determine the new value (assuming there is a difference in value for that Delivery Method between the two Profiles). And it's always possible to change the Charge value directly, by double-clicking into the **Chrg** field and entering a new charge; this new change will stick unless, of course, a later change in Delivery or Rush causes a later re-calculation.

Lend Backfile Grid

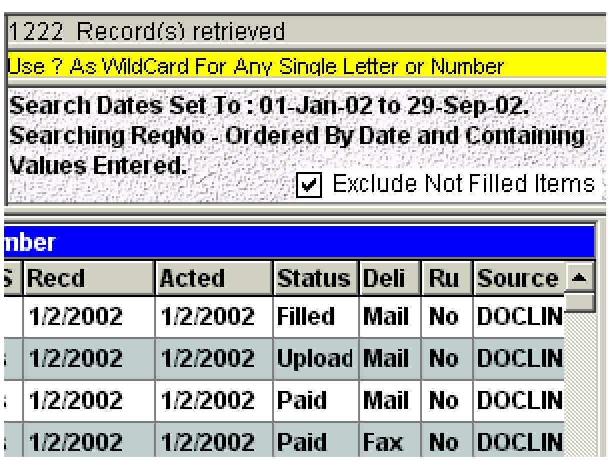
All items that have been acted upon, either Filled or Not Filled, will appear in the Lend Backfile Grid. Initially, the **Date Range for searches** will be either "Six Months Ago to Today," or the "Beginning of the Year to Today," whichever is greater. **Current search dates** are often shown in the gray box just over the top right of the Grid. Current search dates are also available as a Tool Tip when you let the Mouse Pointer hover over the **By Dates Button** for a second or two:



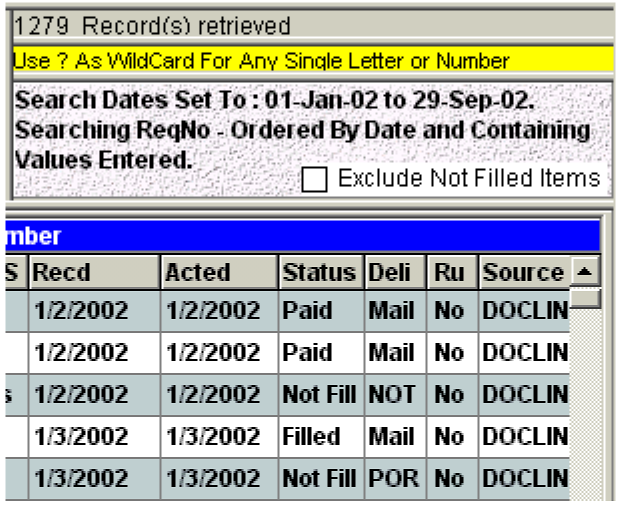
Excluding Not Filled Items from Items Retrieved

In the Lend Backfile Grid, **Not Filled Items** are usually **included** in the records retrieved, except when a **Search By Status of Request** search specifically indicates that a certain status only is expected (e.g., a search for **Status Equals Filled** will not, by definition, include Not Filled Items).

You can specifically exclude Not Filled Items from the records retrieved by checking the **Exclude Not Filled Items checkbox**.

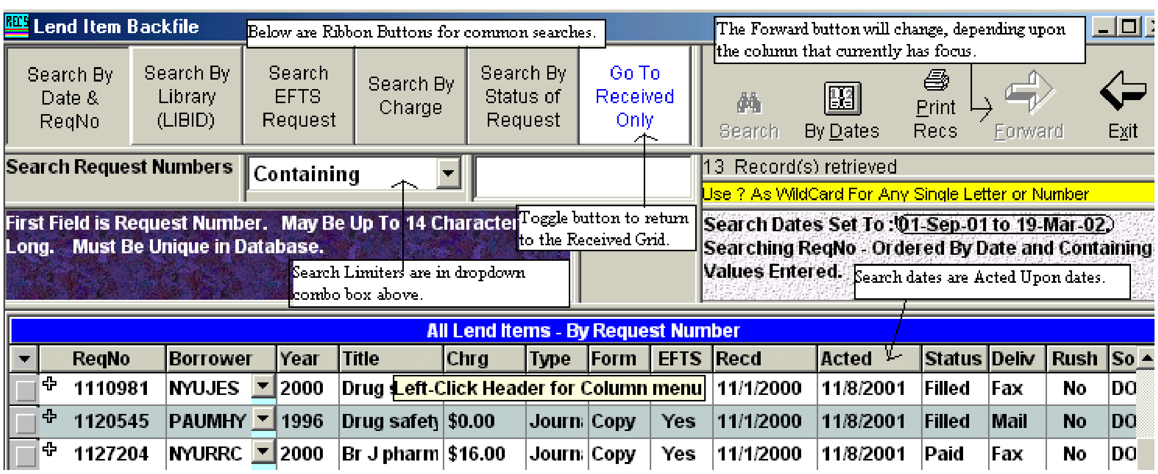


The same search, run with the checkbox unchecked, will include Not Filled requests along with others retrieved using the criteria specified.



Since the Items Received Grid, by definition, won't include items with a Status of Not Filled, the Exclude Not Filled Items checkbox only appears in the Lend Backfile Grid.

As with all Grids, the Ribbon Buttons just above the Search Text Box are used to stipulate a common search type: Request Number, Library, EFTS, Charge and Status.

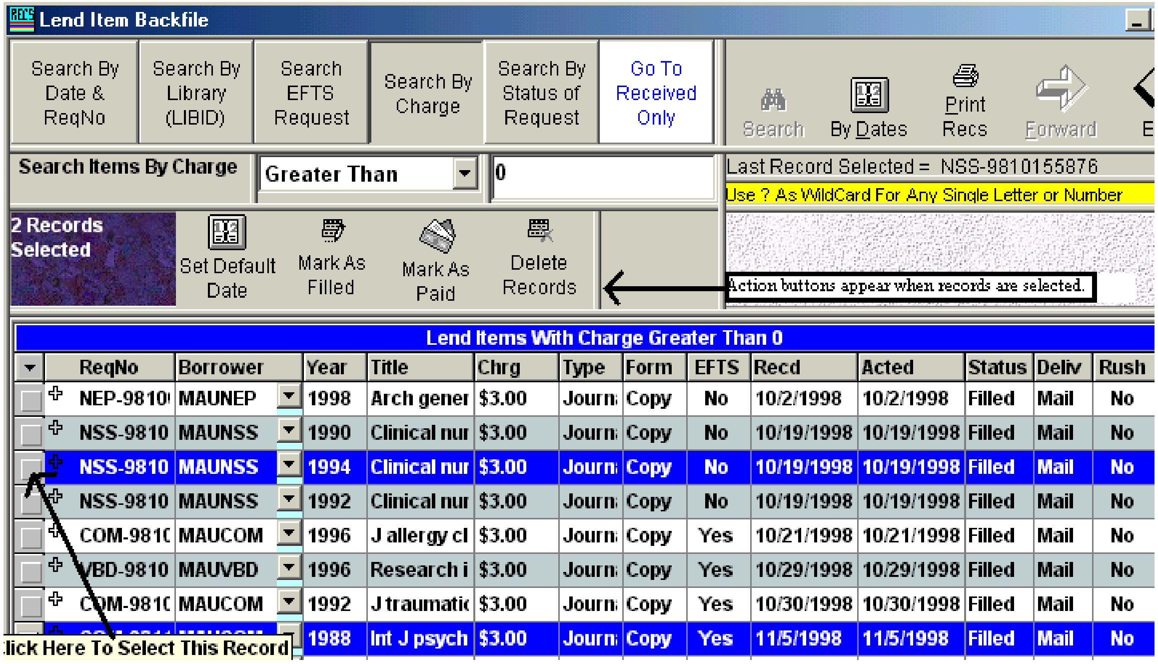


The total number of **records retrieved by a search** is displayed in the space just beneath the By Dates Button.

The **Name of the Grid being used** is always at the top left of the form (Lend Item Backfile, above). A **Description of the Grid's Search Results** appears in the middle of the blue Grid Header ("All Lend Items – By Request Number" in the case, above). Clicking any of the column headers exposes a **column context menu** for that column, with choices for Show All Grid Columns, Global Change, and Sorting A-Z or Z-A.

Selecting Grid records

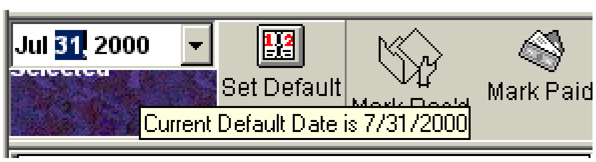
You can select and delete a batch of Grid records by using the **Record Selector button** at the left of each row to select the row (or rows). Selected rows are highlighted in blue, as shown in the illustration below:



In the view above, **highlight rows you want to process by clicking their Record Selectors** (the buttons on the left column). To **select more than one record**, hold down the Ctrl key while clicking, or press the shift key to **select a range of records** from the first record selected to the end of the group you want to delete. To select ALL Records in the Current Grid, you can simply click the topmost button over the Record Selector column (it has a small, inverted pyramid as an icon), and you will notice that all rows in the Grid turn blue.

Setting the Default Date for Batch Processing

Unless you want the **Default Process Date** to be Today's Date (the default), select the Date you want applied to all items in the batch by clicking the 'Set Default Date' button. Use the Date Box or the Calendar to choose the Default Process Date. This is the date that will be applied to all items selected when each is Marked Filled or Marked Paid, appropriate.



Once you've selected the Default Process Date, make sure it's registered by either pressing Enter (if you've been entering it by typing in the date box) or by clicking the "Set Default Date" button again. The current Default Date is always available as a Tool Tip if you place the cursor over the button, as above. Once the Date is satisfactory, click the 'Mark Filled' or 'Mark Paid' button, and all records selected will be processed, one-by-one so that any database relationships can also be updated.

Marking Filled Lend Grid records

Once you've selected the records to update, with the proper update date, you can mark all selected records to Filled by clicking the **Mark Filled Button**. Only items still marked as Received will be affected. Since DOCLINE items updated to Filled online should be registered here automatically, you won't have to use the Mark Filled batch method very often. But in cases where the online update didn't get through to update the database, this method can also be used as a mouse-only check-in method:

1. Click the Record Selector next to the item you want to mark Filled;
2. Change the Default Date if necessary;
3. Click the Mark Filled Button to record the change;
4. Repeat for any other manual check-ins.

Marking Paid Lend Grid records

This is useful for batch processing items you've filled for other libraries where you're using something other than an Invoice or EFTS Upload to bill them; this can be instances where the libraries send along coupons to pay for the service, or where credit is given for reciprocal activity between two libraries.

Once you've selected the records to mark to paid, with the proper date of payment set in Default Update Date, you can mark all selected records to Paid by clicking the **Mark Paid Button**. The item(s) will be filed away as Paid, with the charge equal to that in the CHRG column, using **payment method Other**, with the note "DOCLINE Request."

For the reciprocal Library, you might want to use the **Credit Payment Method** instead of Other. Use the Payments form for this, rather than the Record Selector batch method. The easiest way to get to the Payments form is to click in the Status cell for that row (it currently says Filled), then click the **To Pmts Button** that will appear where the Forward Button was. This will bring you to the Payments Forms, with much of the information automatically filled in. Just change the Payment Method to Credit and add the payment.

Only items marked as Filled can be changed to Paid. If you have an item marked Invoiced or Uploaded to EFTS or Paid, you must first delete the Invoice, etc., to restore it back to Filled before proceeding. Use the **Library Billing Grid** to make these changes.

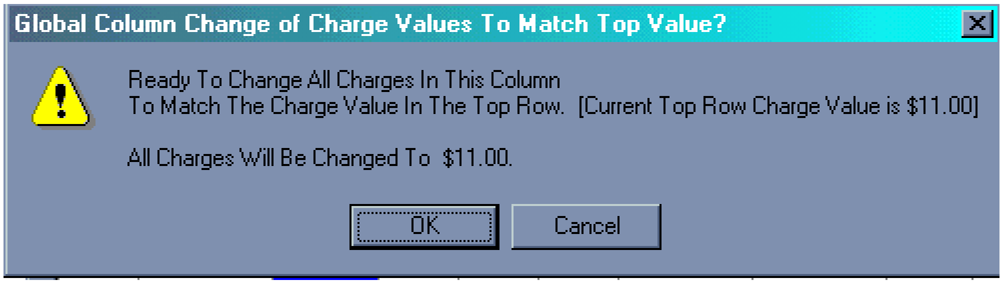
Deleting Lend Grid records

Once you've selected the records to delete, you can delete that batch with the **Delete Records button**. Records marked **'Paid'** or '**Uploaded**' or '**Invoice**' will not be deleted in this batch process. They must first be marked back to '**Filled**' so that any related Invoice or Payment table information can be properly updated as well. Use the **Library Billing Grid** to make these changes.

Global Updates of Lend Grid Columns

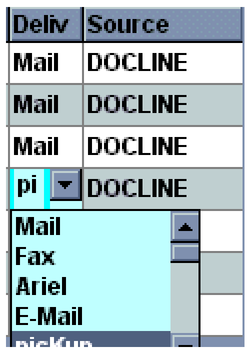
Perform **Global updates** by first editing the topmost record of a column where you want all the records to have the same value. Once the top record has the correct value, perform the Global change by left-clicking the header at the top of the column (such as "**Chrg**" above) to get the Column Context Menu:

Choose "Global Search" from the list. The column will be highlighted and a message box will give you a chance to back out, if necessary.



If you click OK, all the values will change to $11.00, except for columns where processing has moved to a state where a change in charge isn't appropriate, such as Status of Invoiced, or Not Filled. Similar restrictions apply to most Global Column Changes.

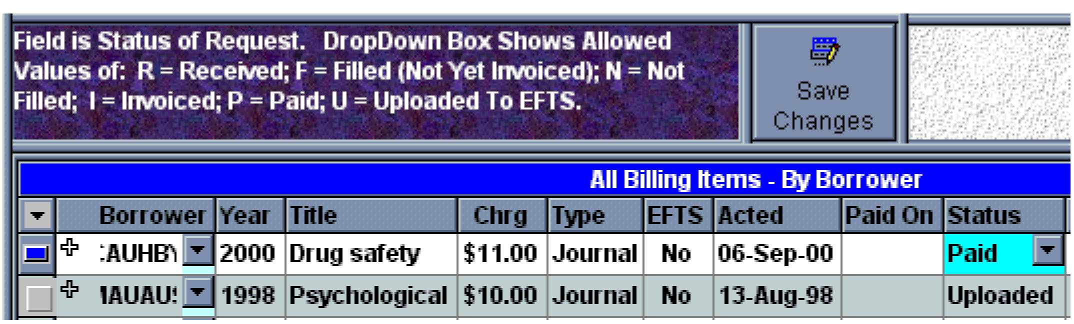
Most of the columns have Dropdown boxes, or Calendar controls, for choosing options. The Delivery Method column can be changed by clicking on the Down Arrow and choosing from the list:



If you start typing the beginning letters of the value (as in picKup, above), the selection should be found as a matter of course. You can also **open a dropdown box on any Grid** either by clicking the down arrow or by pressing `<Alt><Down Arrow>` in the field.

Save Changes Button

In any case where changes are made to values on any Grid, the changes are written to the database whenever the focus is moved from the row that is being edited to another row on the Grid. Just clicking on another row, or using the down arrow or up arrow keys will cause the change to be filed. Once editing has begun, the **Save Changes button** will appear when there are changes ready to be filed. This button is really just an alternative method of registering changes, since any movement out of the row will do the same thing. The Save Changes button is essential, though, when a Grid has but one row.



Clicking this button files any changes without the necessity of leaving the row.

Quick Journal Times Loaned Report

To have a quick look at all Lend transactions for any title, just click into the Title cell in any Lend Grid to expose a **Quick Jrnl Rpt button**. Click this button (or press **<Alt><Q>** on the keyboard) to see a list of all times the Journal Title was loaned since the beginning of the year.

Displaying and editing Lend Citation records

The **citation information underlying the records displayed on any G**rid can be displayed by clicking on the + sign to the left of the record. This information is kept in the **tblLendBibs** Table of QuickDOC.MDB and contains the following fields:

BibRQNO - Request Number, associates this record with tblLendItems

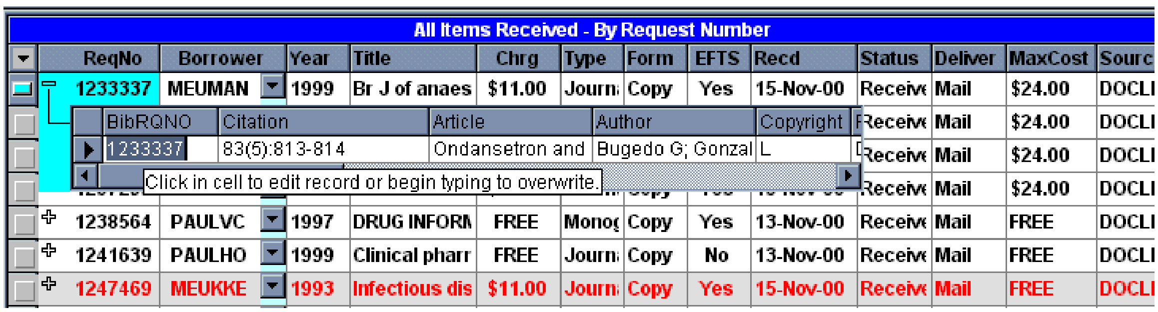
Citation - Citation information

Article - Title of the article loaned

Author - Author of the article loaned

Copyright - L or G, from the original request

Patron - Patron name from request



The highlighted cell is shown as above and any of the information displayed (except for the first cell, which contains the Request Number) can be edited in the usual fashion, by either clicking at an insertion point or typing over the currently selected value.

The insert seems to display best, by the way, when the record to be opened is toward the top of the Grid, where it displays underneath the current record, rather than at the bottom, where the display will move the current record to the top, and then display the child record underneath it. The effect of this movement can be confusing at first in the latter instance.

Searching Lend Grid Records

My boss is asking me how many loans have we gotten at no charge versus the amount we've paid for. Is there any way I can get this for either what we've borrowed or what we have loaned using QD?

The **Compute Totals** Report will give you average cost per Loan/Borrow but not absolute numbers for **Free** and **Not Free**. But we can get these numbers fairly easily from the Lend Grid.

1. Open up the Lend Item Backfile Grid and choose the period you want to search.

2. Click the **Search By Charge** Ribbon Button and enter 0 as the Charge Equal To choice.

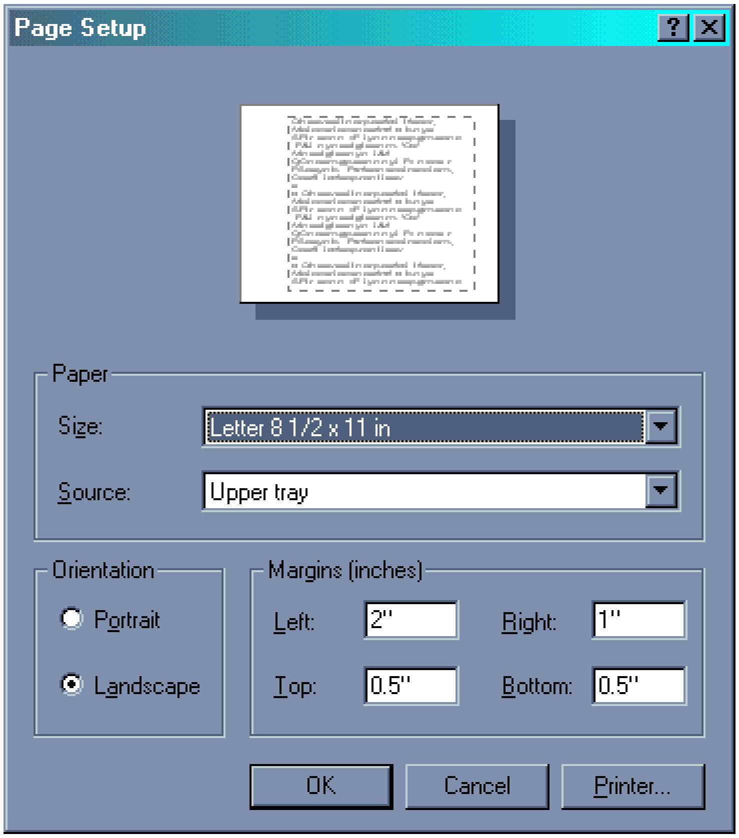
3. Click Search and the total will be displayed as "nnnn **Records Retrieved**" just beneath the Search Button. These will also include Not Filleds, though.

If you want to eliminate those, left-click the header of the Status column and choose Sort Descending. This will put all the Not Filleds near the top. Click on the **Record Selector** (the small button at the far left) of the first Not Filled row, then scroll down and, holding down the Shift Key, click the Record Selector next to the last row. This will select all records in between and will show you the total: "nnn Records Selected" on the upper left. Subtract this number from the total and you have your Lend answer.

Print Lend Grid Records

The **Print Recs button** provides a quick way to get a printout of a Grid. The first time you choose to print you'll be brought to the **Page Setup screen**, to choose your typical print parameters (**Margins**, **Orientation**, etc.).

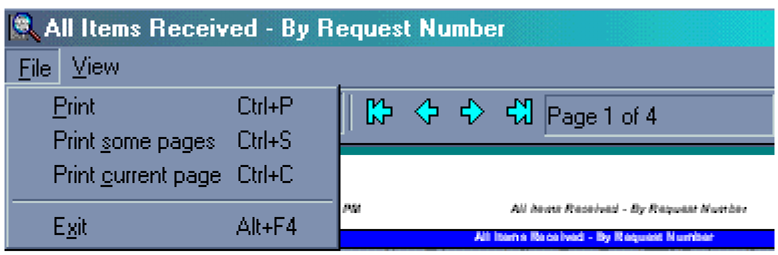
Page Setup for Printing Lend Grid Items



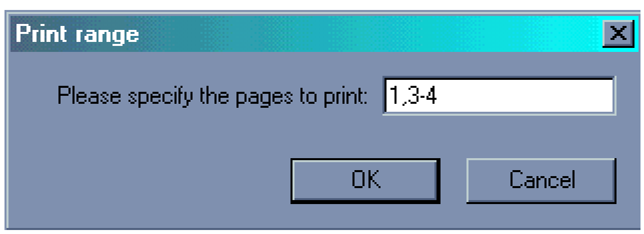
These are saved as defaults (in a file called **PageSet.dat**) and used for subsequent print jobs. If no settings are chosen, then the Page Setup form keeps coming up, so it's a good idea to pick a default setting. Also, when you change printers, or if you encounter a **Printer Not Found** error when trying to print from the Grid, you can force a new Page Setup by choosing **Reset Printer** from the File Menu. This will clear out the current PageSet.dat file so that all new values can be written for the new printer. You'll need to exit QuickDOC and re-enter for the **Printer Reset** to take effect.

Because the Print Setup is used mostly in the Grid Print process, the print-related choices on the File Menu are often not enabled if a Grid is not being displayed. If the choice you want isn't enabled, just open any Grid and populate it with some records. That should give you the following version of the File Menu (under File on the Menu Bar):

If the number of Grid records equals a print job of two pages or less, it will be sent directly to the printer. There are approximately 30 lines on each page for **Landscape** and 37 for **Portrait**, so that reports of fewer than 61 or 75 records, respectively, will be printed directly. If the report is longer than that, you'll first get a message box asking whether you want a **Print Preview** first, where you can choose the specific pages to print.

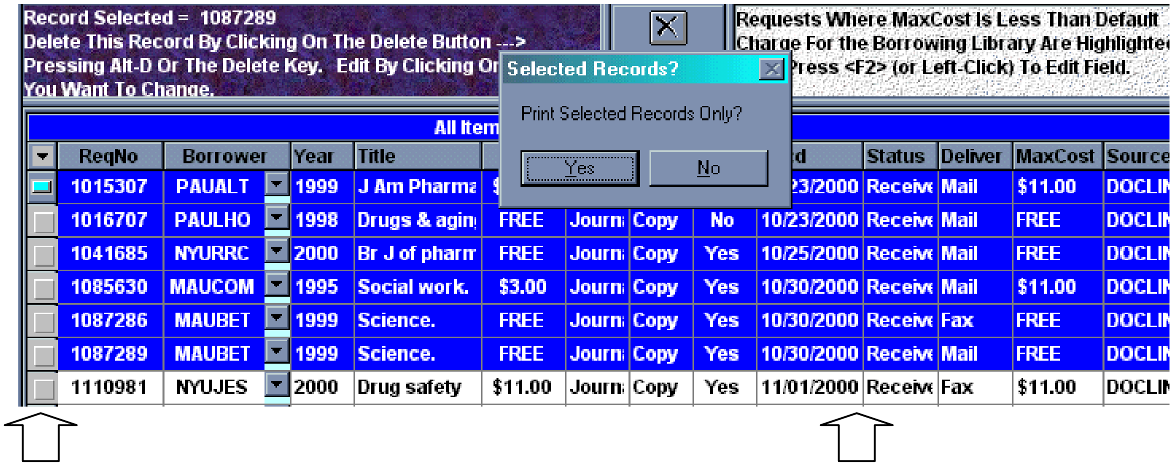


Under **Print some pages**, you can choose the specific pages to print.



In the example above, we've chosen to print the **first page, plus pages three and four**.

You can also choose to **print just Selected Records**. First, select the records you want to print by clicking on the Record Selector button (the leftmost column on the Grid). **Hold down the Ctrl key while selecting to add multiple records, or hold down the Shift key after selecting the first record and click the Record Selector of the last record in the group to select all records in between.**

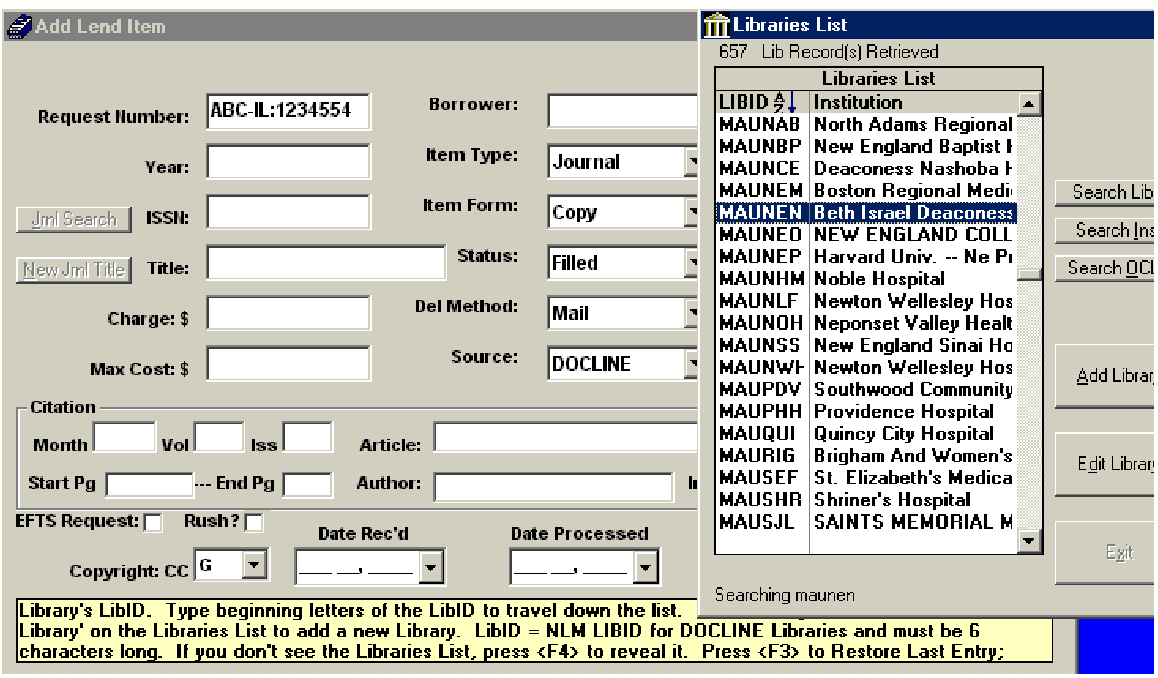


[**This is the** **Record Selector column**.] [**All** **dark blue rows are selected**.]

Add Lend Item Form

Selected with the Toolbar **Add Lend button**, or from the Menu Bar under Add New, and Lend, this form adds a record to the Lend Item backfile. It can be a **Non-DOCLINE item** or an **item not successfully captured through QDPortal**. The Add Lend Item Form also includes access to the **Libraries List**, for selecting the Borrowing Library, as well as a **Journal Titles List** (which is searchable by Title, ISSN or NLM UI), which can also be used for incremental data entry. You can also use the **Down Arrow key** to locate the Library (or Journal Title) and the **Enter key** to choose the highlighted selection and transfer the information to the Add Lend Items form.

If you begin typing the LIBID when the Libraries List pops up, the selection will begin travelling down the list until it reaches the LIBID in question (assuming it's already in there).



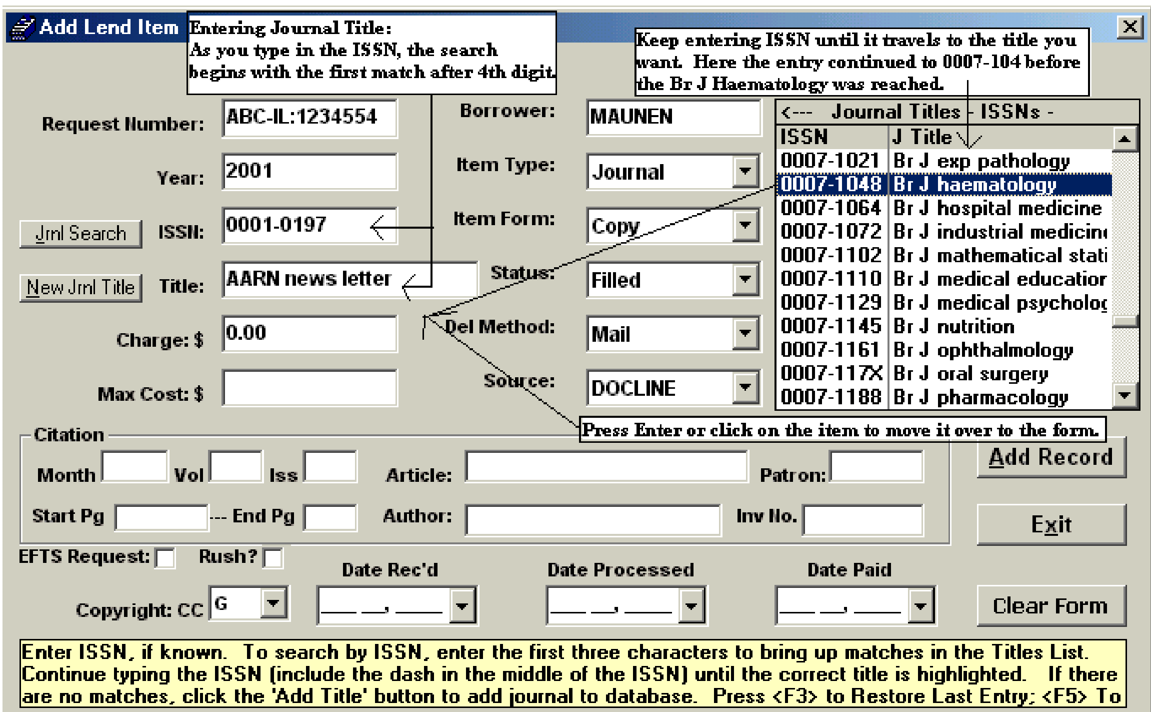
Clicking on that list item (or pressing **Enter** when the item is highlighted) effectively registers your choice. Once you choose the Library from the list, **the Library's values for LIBID, Default Charge, Preferred Delivery Method and EFTS status are filled in at the same time**. If you don't want to use the Lookup List, you can **enter the LIBID directly** (assuming you know what it is) by exiting the Libraries List without making a choice:

1. Double-click in the LIBID box (or press the Left Arrow Key) to return focus from the Libraries List to the Borrower box on the Add Lend Item form.
2. Type in the LIBID.

Check the libraries box to the right and it should match if your typed-in value is in the database.

Default values are also the settings for each of the Combo Boxes, although any others can also be chosen from the dropdown list.

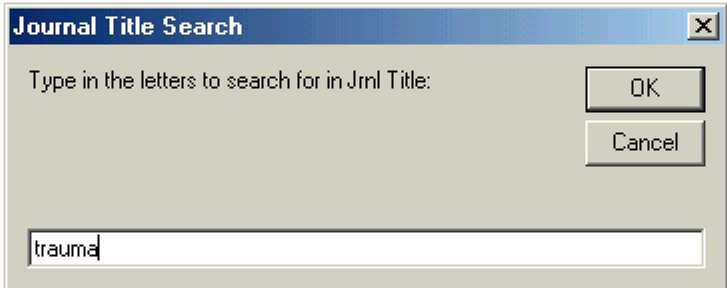
The program keeps a table of **Journal Titles**, **ISSNs** and **NLM UIs**, sorted alphabetically by either ISSN or Journal Title, which can be used for authenticated data entry. Choosing an item from the list will fill in both the Title and ISSN text boxes.



The first match after four digits will move those values over to the Add Lend Item form. But keep entering the ISSN until it travels down the Journal Titles – ISSN List to the correct Journal Title. At that point press Enter or click on the entry to move the values for ISSN and Journal Title over to the Add Lend Form.

If you don't know the ISSN, leave it blank and use the Title box in much the same way: For an **incremental Journal Title Search** begin typing the Journal Title, using the common QuickDOC abbreviations (see below) and the list will be populated after the fourth character. Continue typing until you reach the desired title (it would require Br J h to get there in the above case).

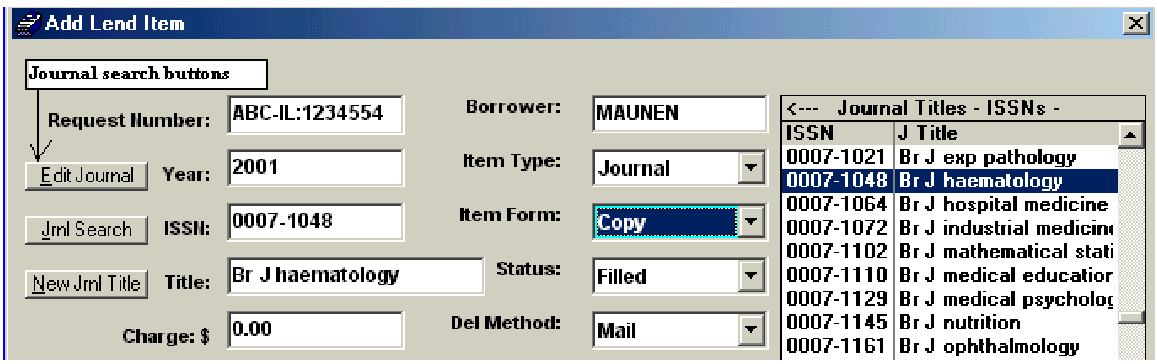
You can also use the **Journal Search button in the Add Lend Form** to search on title words:



would return all titles with “trauma” in the Journal Title.

Use the **New Journal Title button** to move to the **Add/Edit Journals Form** to add a title.

Once the Journal ISSN and Title have moved over, a new **Edit Journal Button** appears, which can be used to move directly to the Add/Edit Journals Form:

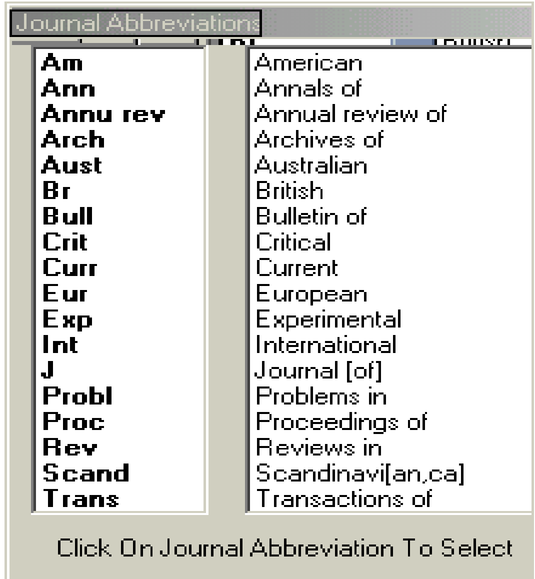


If the Journal Title is not on the list, you can add the Title and ISSN so that it's included in future lists, or you can just add the title for this request only (without the ISSN). Since we don't keep track of ISBNs, this will always be the case for monographs.

When entering titles directly, either here or in the Edit/Add Journal Title form, try to use the list of Journal Abbreviations that appears just off the right side of the form, so that future sorting and displaying of Journal information can be consistent. You can enter a Journal abbreviation by clicking on it, or simply by typing it in on the form.

Journal Abbreviations used in QuickDOC are few and fairly standard.

Journal Abbreviations



An attempt will be made to automatically format data entered for **Citation information**, etc., so that keyboard data entry can be as efficient as possible. In general, the following rules obtain:

1. You can retrieve the last entry made in any text box during the current session by pressing <F3>.
2. Borrower choice is made from the Libraries List.
3. Entries with Combo Boxes respond to typed entries by travelling down the list of choices.
4. ISSN and Title boxes present a list matching the first three letters typed and then travel down that list for each additional letter typed. Press Enter when the correct item is reached.
5. Borrower Charge box is completed with the default charge filed for that Delivery Method in the Borrowing Library record.
6. The Max Cost box is automatically given whatever value is entered in the Charge text box.
7. Date fields and Combo Boxes retain the values from the previous entry as defaults.
8. All citation information (including Month) can be typed in lower case and QuickDOC will attempt to reformat after you press Enter for that field (you can press the Up Arrow, or Shift-Tab, to return to a previous field if the automatic format is not to your liking).
9. When typing in page numbers, if you press the dash (-) after the **Start Page** the cursor will jump directly to the **End Page**.
10. The Print Copy Checkbox will retain its last value (True or False) from session to session.
11. The Alt-A accelerator key will work to simulate a click of the Add Record button from anywhere on the form

The **Print Copy checkbox** determines whether a printout of the information for this request will be after the record is added. If you want hardcopy printouts of each item added, check this box. Once the box is checked (or unchecked), that value is filed in the tblLocals table of QuickDOC.MDB as

PrintLendAdd = True

and becomes the default thereafter.

Requests are printed two to a page, so you won't actually see the first printout until after the second request is entered. If the Exit button is clicked after an odd number of records were added, the last request will be printed at that time on a page of its own.

Since these printouts use your **Default Printer**, it will also use whatever default settings your printer was left at during your last print job. Watch out for situations where the printer was left at Landscape instead of Portrait, or where some other application set the printer to some special setting and never reset it back. Strange characters may result in the latter case. Turning the printer off and on will usually reset the default settings.

Print Format of Added Lend Request

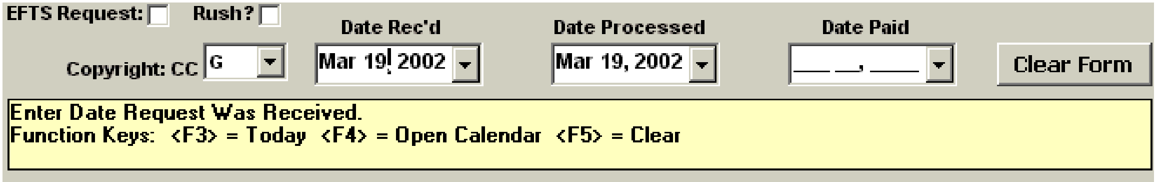
Lends added using the Add Lend Item Form have the following format:

Added Lend Request Number: 44297
Date Added: 7-Nov-01

Borrower LIBID:	MAUHMS		
Journal Title:	Science		
Citation:	1999 Dec;286(5448):2248-		
Article Title:	NIMH		
Article Author:	Holden C		
ISSN:	0036-8075		
Request Status:	Filled	**Source of Request:**	DOCLINE
Item Type:	Journal	**Item Form:**	Copy
Delivery Method:	Fax	**Copyright:**	CCG
Patron:	Smith		
EFTS Pmt:	True	**Rush Request:**	False
Charge:	$11.00		
Max Cost:	$11.00		
Date Recd:	7-Nov-01		
Date Filled:	7-Nov-01		
Date Paid:			

Dates on Added Lend Records

Today's Date will be the default date for records added, but previous values are kept from record to record in most cases, so that repetitive data entry might be reduced. In all data entry Date fields, the format is now **mmm dd, yyyy**, so that International dates can be entered in a format understood no matter what the machine's Date setting format might be. If you press "D" in the Date Rec'd text box, below, the entry will jump to "Dec" since that's the only match. You can also use the dropdown calendars, as always, for entry of dates.



Entering Multiple Lend Records

There are **function keys in Add Lend Data Entry Fields** that may help with data entry when entering multiple records.

The <F3> Function Key will Restore the Previous Entry in this field.

The <F5> Function Key will Clear this field.

The **function keys in Add Lend Date Fields** have specific duties:

The <F3> Function Key will enter Today's Date.

The <F4> Function Key will display the Calendar (useful if your hand is on the keyboard, not the mouse).

The <F5> Function Key will Clear the field.

Library Billing

Monthly Billing Overview

QuickDOC can be used to manage Monthly (or other periodic) billing by **Invoice**, by **EFTS** (a system run primarily for Medical Libraries through the **University of Connecticut Health Center**), by **IFM** (a system run by **OCLC** for OCLC items), by **Deposit Account** or by **individual request** payment.

Suggested steps are as follows:

1. Open the **Library Billing Grid** and set the dates for the period to be billed.
2. Click the **Search By Status of Request** ribbon button to search **Filled items** only.
3. If you have Libraries with **reciprocal agreements** or other creative financial arrangements, you can process these first, either by
    a. changing the charge to 0.00, or
    b. clicking into the **Status** Field (currently set to 'Filled'), exposing the **To Pmts** button, which will allow you to post the payment with Payment Method **Credit**, or
    c. whichever other method you use to make these ineligible for EFTS Uploads or Invoices.
4. If you have items that will be paid by **IFM**, check those next.
    a. Click the IFM Header and choose Sort Descending to put all IFM eligible items at the top;
    b. Make sure **EFTS = No** for all those that will be paid by IFM (items with EFTS = Yes and IFM = Yes will be included in any intervening EFTS Upload, although not on Invoices);
    c. Change the IFM value to No for any IFM item you want to bill by Invoice or EFTS.
5. If you have items to be billed through **EFTS**, check those next.
    a. Click the **Show EFTS Upload Items** ribbon button and set **Equal To TRUE** to see the items from that period that will be included in an EFTS Upload File; scan to be sure that the charges are appropriate;
    b. If you have time, also check the same with the value set **Not Equal To True**, to see the items that will NOT be included; in some cases you may wish to change the charge or the EFTS value if it hasn't been set properly. In most cases, if you sort by Borrower after getting this list, any anomalies will stand out amidst that Library's other activity.
    c. All the items in the EFTS Not Equal to True list will be either **Free** (never to be billed), **IFM = Yes** (waiting to be paid by IFM), or **ready for Invoicing**.
6. Run the **Create EFTS Upload File** process, which will change the status of those to Uploaded.
7. Run Invoices for that month.

Billing Options and Forms

The Library Billing Grid

Choose the **Library Billing Button** on the Tool Bar to get to the Library Billing Grid.

This Grid shows Billing-related information, including Paid Date and the Invoice Number or EFTS Upload related to each item. When you select the **Library Billing Grid**, an additional criterion on Charge <> 0.00 is applied, so that the **Library Billing Grid won't included FREE items**.

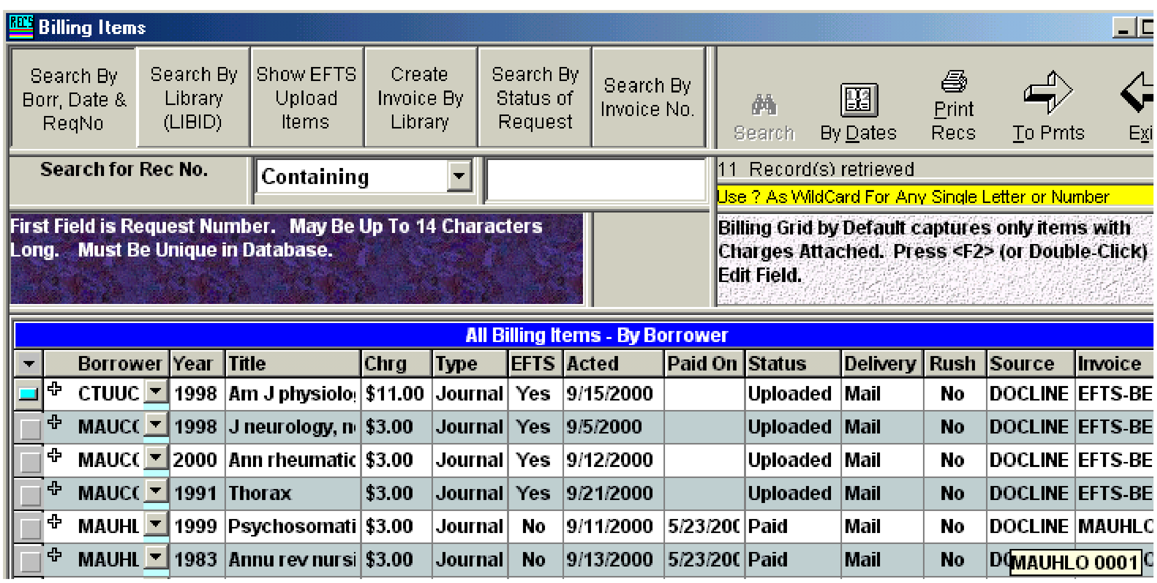
The Library Billing Grid also includes two special **Ribbon Search Buttons:**

Show EFTS Upload Items Search

Create Invoice By Library

The **Show EFTS Upload Items** button can be used to provide a quick display of items that will---or will not, depending upon the Combo Box choice---be contained in an EFTS Upload file for the Dates chosen. This choice is explained further in the EFTS section, later.

The **Create Invoice By Library** button creates a list of items for the Borrower selected that qualify for Invoicing during the period from the Beginning Date to the End Date selected. A brief discussion of this tool is included in the section below.

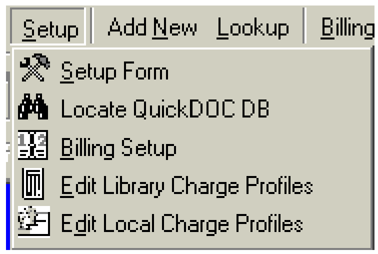


This list, for the period 1-Sep-00 to 30-Sep-00, contains all records with a charge for the period specified (leaving the Search Text Box blank will always get all matches). The items for MAUHLO have already been invoiced and paid, and the Invoice Number appears in the rightmost row of the Grid. If you hold the cursor over a partially revealed value, a tool tip will pop up with the complete field information. If you want to make a horizontal scroll bar appear at the bottom of the list, so that you can scroll to make the last column appear completely, drag the vertical bar between 'Source' and 'Invoice' in the header to the right (making the Invoice column even smaller); once it reaches a width where it's nearly invisible, the scroll bar at the bottom will appear, to facilitate moving that row into view.

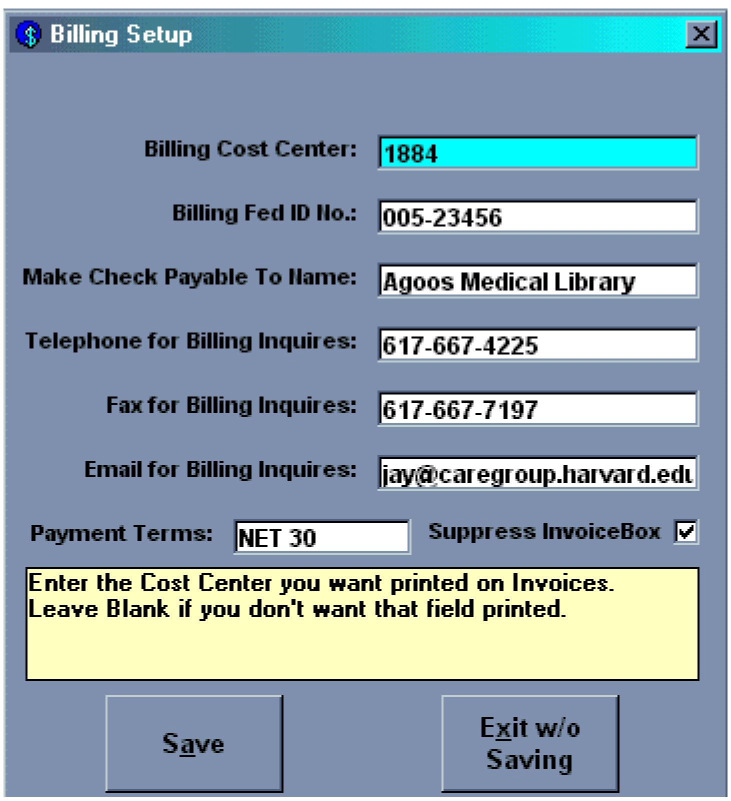
The Library Billing Grid, because it automatically screens out FREE items, makes searching and editing a bit less complicated for preparing Invoices and EFTS Uploads, but be sure to check the general Lend Grid periodically for items mistakenly filed as FREE. Clicking on a cell in the Borrower Column of any Grid will expose the **To Libs button**, where a Library's charge may be quickly edited, so that future requests are filed with the proper charge.

Billing Setup Menu Item

Before printing Invoices for the first time (and whenever you need to make changes to any of the Invoice boilerplate information thereafter), check under the **Setup** Menu for **Billing Setup**, which contains values for items normally printed on an Invoice.



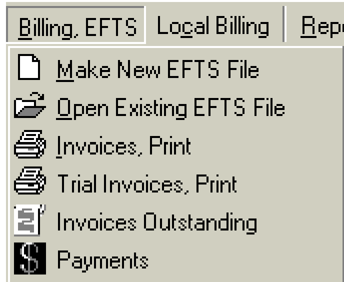
Billing setup includes the following items:



Brief descriptions and context-sensitive help are in the yellow box just above the Command Buttons.

Print Invoices

Print Invoices is the third choice under the **Billing, EFTS Menu**.



The Invoice choice is also available under the **Reports** Menu Bar item, **Loaned Items**. Use either of these methods to print a regular monthly Invoice run. See **'Create Invoice By Library'**, below, for a method that will print an invoice for a single Borrower (or a selected group of Borrowers) only. Invoices can be printed to **Print Preview**, in order to get an idea as to what will be generated, or to any **Printer** that shows up in your list of Printers. **Invoices can also be printed with up to 5 copies** on each run.

Invoice Numbers are composed of the LIBID of the Library being billed and a sequential number, running from 0001 to 9999 before resetting, to further create a unique number. The last Invoice Number used is kept in the **tblLocals** Table in QuickDOC.MDB, under the tag **LastLendInv**.

Print Trial Invoices

The **Print Trial Invoices** choice, above, prints exactly as the Invoice run will print, except that Invoice Numbers aren't assigned, and only one copy of each Invoice is printed. Use this instead of the Print Preview to generate actual invoices that can be used for proofreading and editing prior to running the actual invoices.

How Items are Selected to be included in an Invoice:

1. The item must have a **Charge** (or Credit) other than 0.00
2. **EFTS** must be **No**.
3. **IFM** must be **No**.
4. **Status** must read **Filled**.

In the Billing Grid below, only the last two items, with the red check marks, would appear on an invoice run, either the automatic batch run or an individual Invoice printed frem the 'Create Invoice' button:

All Billing Items - By Borrower

	ReqNo	Borrower	Year	Title	Chrg	Type	EFTS	IFM	Acted	Paid On	Status	Deli	Ru	Source
	04609496	COUCOL	1997	Transcultural	$8.00	Monog	Yes	No	4/12/2002		Filled	Mail	No	OCLC
	6000041	MAULCB	1996	Paediatric an	$3.00	Journ	Yes	Yes	2/22/2002		Filled	Fax	No	DOCLI
	5726795	MAUSLM	2001	Seminars in r	$3.00	Journ	Yes	No	1/30/2002		Filled	Mail	No	DOCLI
	5727405	MAUSLM	1999	Biology of nec	$3.00	Journ	Yes	No	1/30/2002		Filled	Mail	No	DOCLI
	5750729	MAUSLM	1995	Indian pediatr	$3.00	Journ	Yes	No	2/1/2002		Filled	Mail	No	DOCLI
	5862908	NJUCSM	2001	J inherited m	$10.0	Journ	Yes	No	2/12/2002	6/17/2002	Paid	Mail	No	DOCLI
	5323916	WAUWAS	1989	PHYSIOLOGIC	$5.00	Monog	No	Yes	12/19/200		Filled	Mail	No	DOCLI
✓	5846093	WYUCBL	1989	MCN. Am J m	$5.00	Journ	No	No	2/11/2002		Filled	E-Ma	No	DOCLI
✓	5838920	WYUCBL	2001	J pediatric ga	$5.00	Journ	No	No	2/12/2002		Filled	Mail	No	DOCLI

The Invoice is printed in the following format (this is the Print Preview version; the Printed versions is exactly the same, but also includes a Bold **Invoice Total** at the top, across from the Borrower's address):

Invoice

01-Aug-00 to 31-Oct-00

27-Dec-2000 **Invoice Number: MAUHYA 0001** **Page 1**

Make Check Payable To: Agoos Medical Library **Terms: NET 30**

Beth Israel Deaconess Medical Center
Agoos Medical Library
330 Brookline Ave.
Boston, MA 02215

Tel: 617-667-4225
Fax: 617-667-7197
jay@caregroup.harvard.edu
FedID: 1234-55
Cost Center: 1884

Include copy of Invoice or Inv No. with payment

CAPE COD HOSPITAL
Frazier-Grant Medical Library ILL
27 PARK STREET PO BOX 640
HYANNIS, MA 02601

Req No.	*Year Title*	*Citation*	*Patron*	*Charge*	*Date Filled*
297365	2000 Psychological medicine.	Mar;30(2):433-42	Gordon, Dr.	$3.00	14-Aug-00
268516	1998 J oral maxillofacial surgery	Oct;56(10):1170-6; d	Bergland, Dr.	$3.00	14-Aug-00
268515	1998 J oral maxillofacial surgery	Oct;56(10):1158-63	Bergland, Dr.	$3.00	14-Aug-00
268514	1999 J oral maxillofacial surgery	Jun;57(6):667-71; di	Bergland, Dr.	$3.00	14-Aug-00

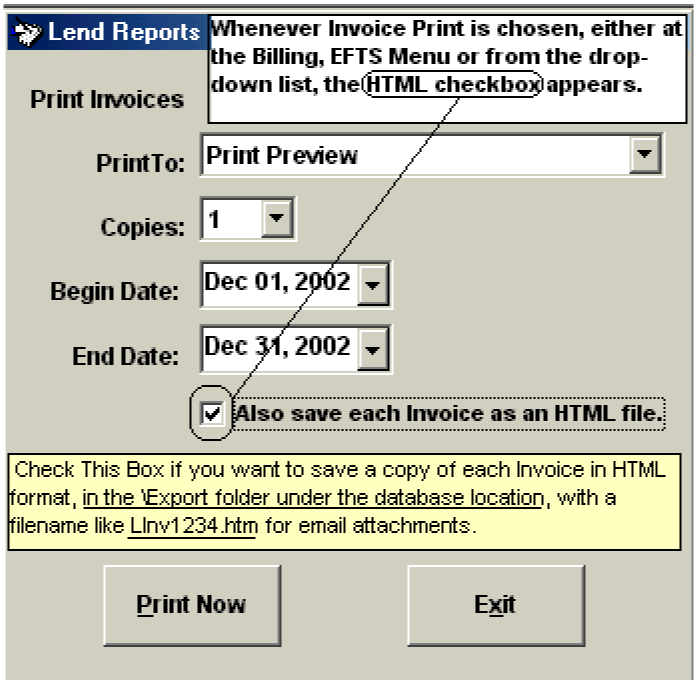
Total Items For MAUHYA: 4 **Total Charges: $12.00**

Once the Invoice is printed for an item, the **Invoice Number is available on the Library Billing Grid, in the Invoice column**.

HTML Invoice option for Electronic Billing

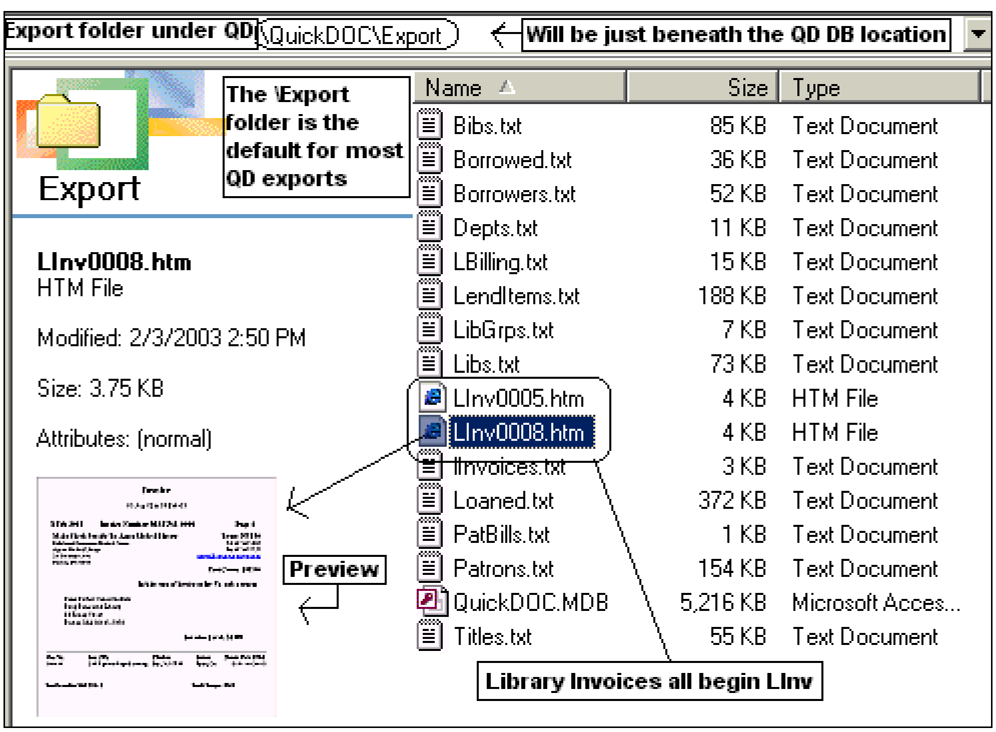
At the time Library Invoices are printed each month, you can opt to save a copy of each Invoice as an HTML file. These HTML versions of the Library Invoice can be forwarded as an email attachment to Libraries you wish to bill electronically. To save an HTML version of an Invoice run, check the **Also save each Invoice as an HTML file** checkbox on the Lend Reports form after choosing the Invoice Report. Invoices printed, or reprinted, from the Library Billing Grid will also provide a prompt for this save.

.



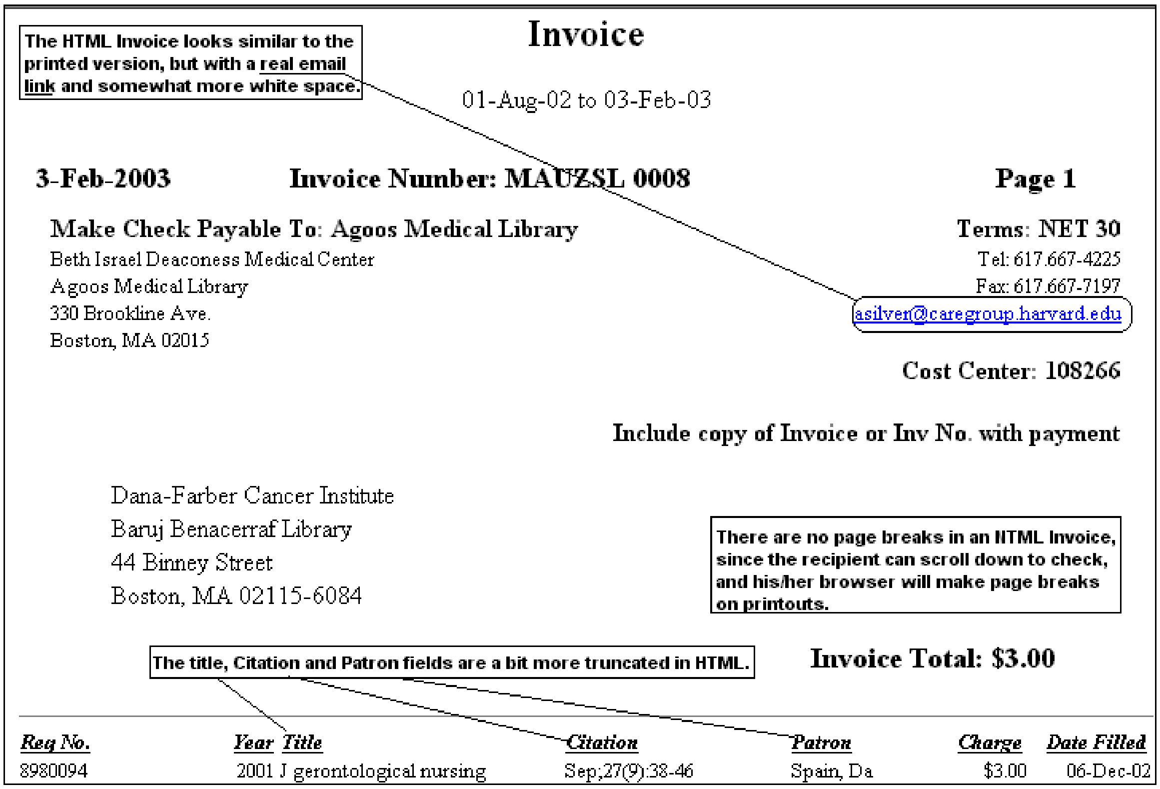
If this box is checked, a copy of each invoice will be saved in the **Export folder** that always exists just beneath the location of the QuickDOC.MDB database. All **Library Invoice HTML files** will be in the format **LInv####** (where #### is the actual four-digit invoice number), e.g., LInv1234.

Since these files aren't created during Print Preview, it will be necessary to print at least one copy of the invoice in order to have the file generated. Once the files are made, you can use the printouts to identify the files to send as email attachments. They will all be together in the Export folder:



These **HTML Invoice files will be deleted when an Invoice is deleted**, and also **when an Invoice is paid**, but it will be useful to clean these files out from time to time to prevent clutter. If you delete an HTML Invoice file that you later want to resend, you can **recreate it by running a Reprint of the original Invoice**.

HTML Invoices are quite similar to printed Invoices and will be displayed in whatever might be the default Browser of whoever clicks on the file icon. Displayed in Internet Explorer it looks as follows:



The HTML Invoice looks similar to the printed version, but with a real email link and somewhat more white space.

Invoice

01-Aug-02 to 03-Feb-03

3-Feb-2003 Invoice Number: MAUZSL 0008 Page 1

Make Check Payable To: Agoos Medical Library

Beth Israel Deaconess Medical Center
Agoos Medical Library
330 Brookline Ave.
Boston, MA 02215

Terms: NET 30
Tel: 617.667-4225
Fax: 617.667-7197
asilver@caregroup.harvard.edu

Cost Center: 108266

Include copy of Invoice or Inv No. with payment

Dana-Farber Cancer Institute
Baruj Benacerraf Library
44 Binney Street
Boston, MA 02115-6084

There are no page breaks in an HTML Invoice, since the recipient can scroll down to check, and his/her browser will make page breaks on printouts.

The title, Citation and Patron fields are a bit more truncated in HTML.

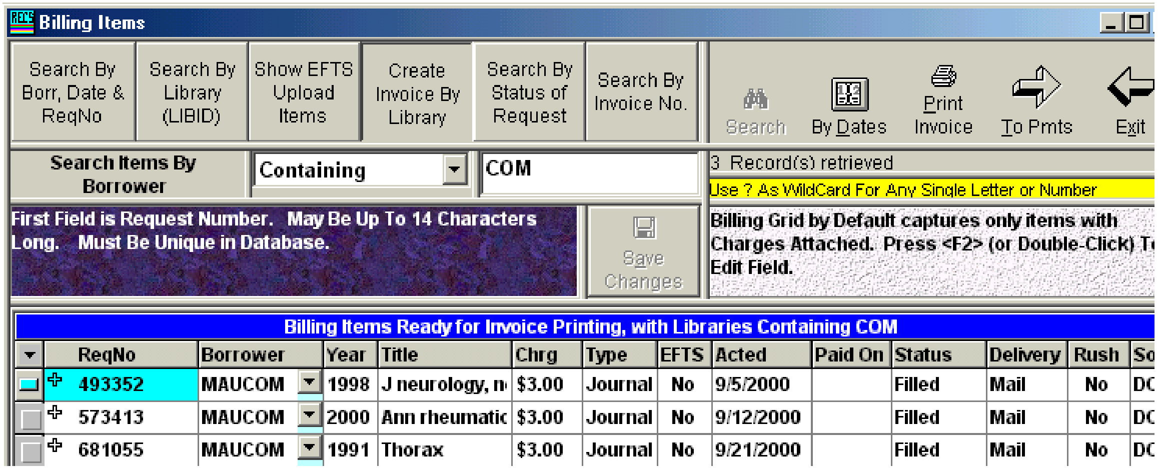
Invoice Total: $3.00

Req No.	Year	Title	Citation	Patron	Charge	Date Filled
8980094	2001	J gerontological nursing	Sep;27(9):38-46	Spain, Da	$3.00	06-Dec-02

HTML Invoice files are also saved when printing or reprinting Invoices from the Library Billing Grid, below.

Create Invoice By Library

The **Create Invoice By Library** button creates a list of items for the Borrower selected that qualify for Invoicing during the period from the Beginning Date to the End Date selected. Here's the list for MAUCOM (I changed their EFTS value to 'No' so they would qualify for Invoices) created for the 01-Sep-00 to 30-Sep-00 period:



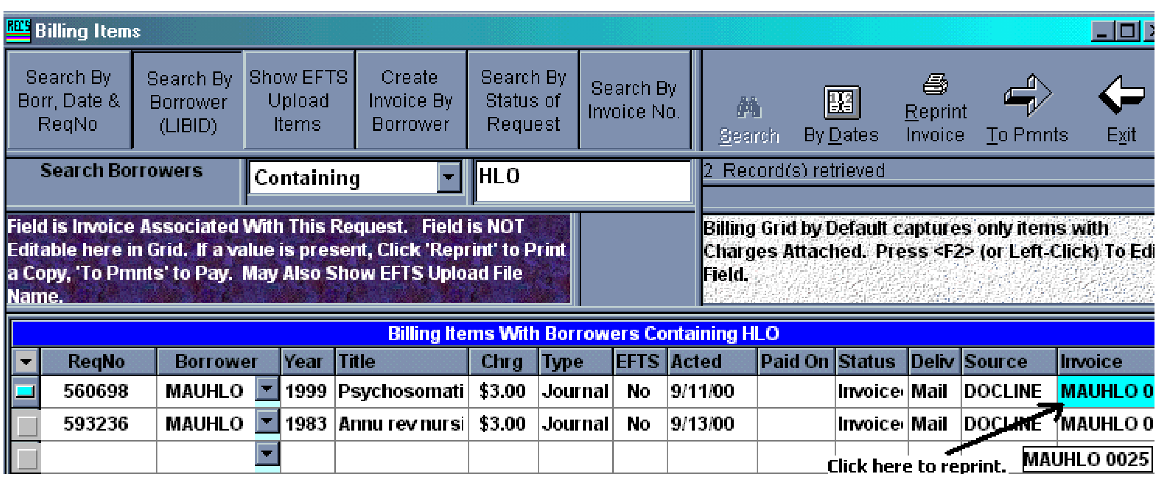
ReqNo	Borrower	Year	Title	Chrg	Type	EFTS	Acted	Paid On	Status	Delivery	Rush	So
493352	MAUCOM	1998	J neurology, n	$3.00	Journal	No	9/5/2000		Filled	Mail	No	DC
573413	MAUCOM	2000	Ann rheumatic	$3.00	Journal	No	9/12/2000		Filled	Mail	No	DC
681055	MAUCOM	1991	Thorax	$3.00	Journal	No	9/21/2000		Filled	Mail	No	DC

Notice that the 'Print' Button above the 'Records Retrieved' panel now says '**Print Invoice**' rather then 'Print Recs'. If you click this button, an Invoice for these items, for this Borrower, will be printed, using the **last Printer you specified when printing an Invoice Run**, and in the number of copies specified then, as well.

Before the invoice is printed, you are asked whether you also want an **HTML Invoice file saved**. This question will appear before each print or reprint; just press **N** to dismiss it without saving as HTML, or Enter to save a copy. Unused copies won't hurt anything, but will require cleaning out that Export folder from time to time. At some point I hope to have some general profile for suppressing this box for those who will never print an HTML Invoice, but for now just press **N** here and keep the **HTML checkbox** unchecked in the batch Invoice prints.

Reprint an Invoice

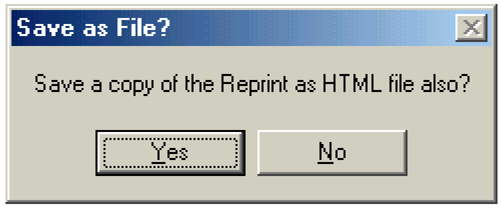
You can **Reprint a single Invoice** for any invoice listed in the **Invoice Column** on the Library Billing Grid by **clicking once on the Invoice cell to be reprinted**, then clicking the '**Reprint**' Button.



ReqNo	Borrower	Year	Title	Chrg	Type	EFTS	Acted	Paid On	Status	Deliv	Source	Invoice
560698	MAUHLO	1999	Psychosomati	$3.00	Journal	No	9/11/00		Invoice	Mail	DOCLINE	MAUHLO 0
593236	MAUHLO	1983	Annu rev nursi	$3.00	Journal	No	9/13/00		Invoice	Mail	DOCLINE	MAUHLO 0

Invoices reprinted in this way will be printed, using the last Printer you specified when printing an Invoice Run, and in the number of copies specified at that time. The Reprint will include all items with that Invoice Number in the Invoice column and will re-calculate the Invoice Total as it prints, so that, if you delete an item, and then reprint that Invoice, the Invoice will include the original invoice total at the top, but a revised total at the bottom.

On Invoices Reprinted from the Library Billing Grid, you are asked before each Invoice is printed whether you also want an HTML Invoice file saved:



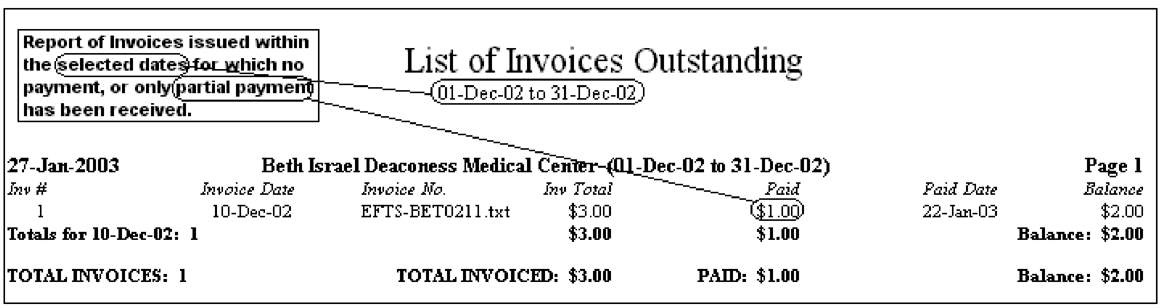
This question will appear before each print or reprint; just press **N** to dismiss it without saving as HTML, or Enter to save a copy.

Rather than deleting items included in an Invoice and then reprinting, it's best to create a new invoice, if the original hasn't already been sent, or add an adjustment (a payment) equal to the charge for the item you don't want to include, since payments are factored in when an invoice is reprinted.

Payments made on an Invoice are subtracted from the Invoice Total at the top, and are also noted as Payments at the bottom of the Charge column, along with both the original and revised Invoice Totals.

List of Invoices Outstanding

The Billing, EFTS Menu Bar choice also includes a Report of Library Invoices Outstanding. This report includes all invoices generated during the period specified that have not been paid, or have received only partial payment.



This list can be used to reprint a second notice for selected invoices. A more automated process for generating second notices is still planned for some time in the future.

Deleting an Invoice - Library Billing Grid

If you click once in the **Invoice column** of the Library Billing Grid, the **To Pmts** button will appear just above the Grid. Use this button both to delete (or post) payments and to delete the Invoice listed in the LocalInvoice column. **If there is a payment posted to the Invoice, you must first delete the payment before deleting the Invoice**.

The **Payment Information Form** for an the Invoice specified in that Invoice cell will appear when you click the To Pmts button. If there has already been a payment on this Invoice you must first delete the Payment by clicking the **Delete Payment button**. This will produce the usual Message Box asking if you are sure. Click Ok.

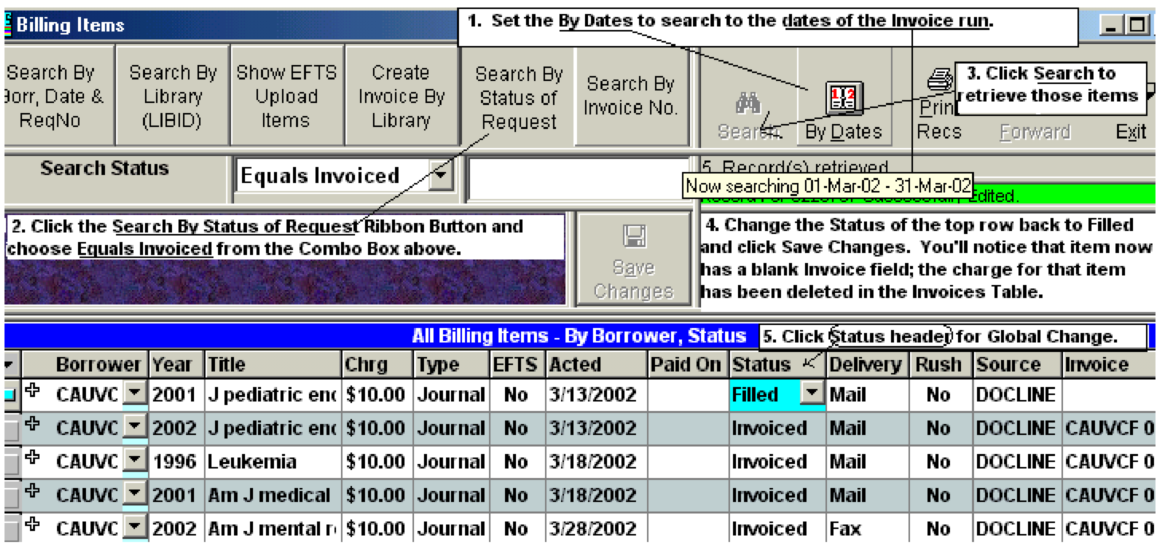
When you click Ok, the payment is deleted and the affected items in the Grid are returned to Invoiced status. We're now ready to delete the Invoice. Click back into an Invoice cell that contains the Invoice we want to delete. Then click **To Pmts** again. The Payments Form reappears.

If the Delete Button still reads "Delete Payment," click once on the **Invoice Number Combo Box**. The button will change to "Delete Invoice" and will be enabled. After you click the **Delete Invoice Button**, you'll get the "Are You Sure?" Message Box. Click Ok to delete the Invoice.

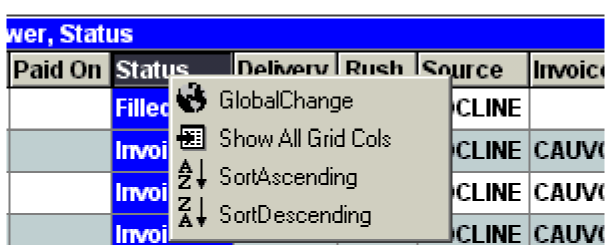
After you click Ok, the Invoice will be deleted from the Invoices Table, all items in the Grid for that Invoice will be reset back to Filled, and the Invoice value will be blank.

Rerun a batch of Invoices

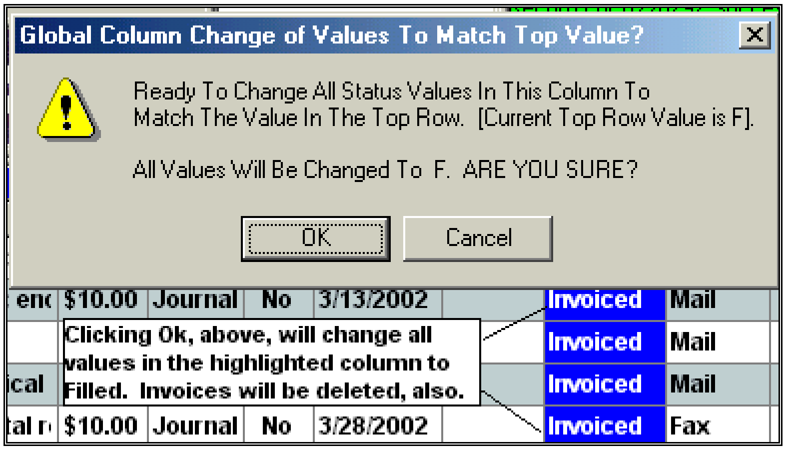
You can **Rerun a batch of Invoices just printed** by using the Global Change function on the Status column to reset all the invoiced items back to Filled. This process will also remove each item from the **Invoices Table** (tblInvoices) and **delete each invoice** when all of its items have been deleted. The steps are illustrated below.



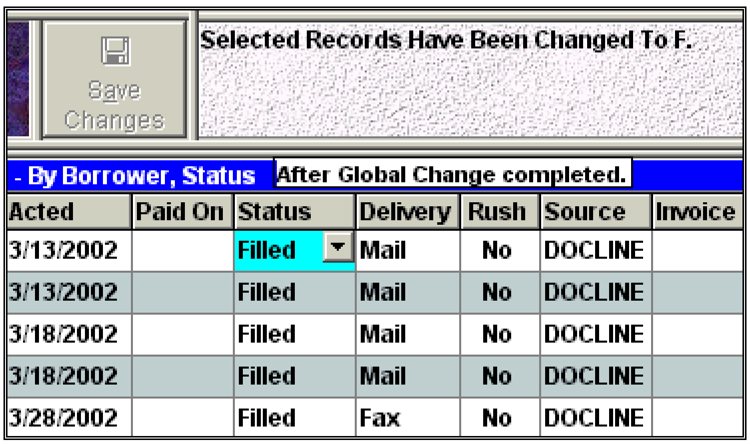
1. **Set the Dates** to the same dates for which the batch of invoices was run.
2. Click the **Search By Status** Ribbon Button and choose **Equals Invoiced**.
3. Click **Search** to retrieve those items.
4. **Change the Status of the top row** from Invoiced to Filled and click **Save Changes**. This step will also remove the charge for that item from the Invoice Record in tblInvoices.
5. Click the header on the Status Column to get the **Header Context Menu**.



6. Click **Global Change**. This will select all the items in that column for change.
7. Click **Ok** at the message about changing to F (F is the code for Filled).



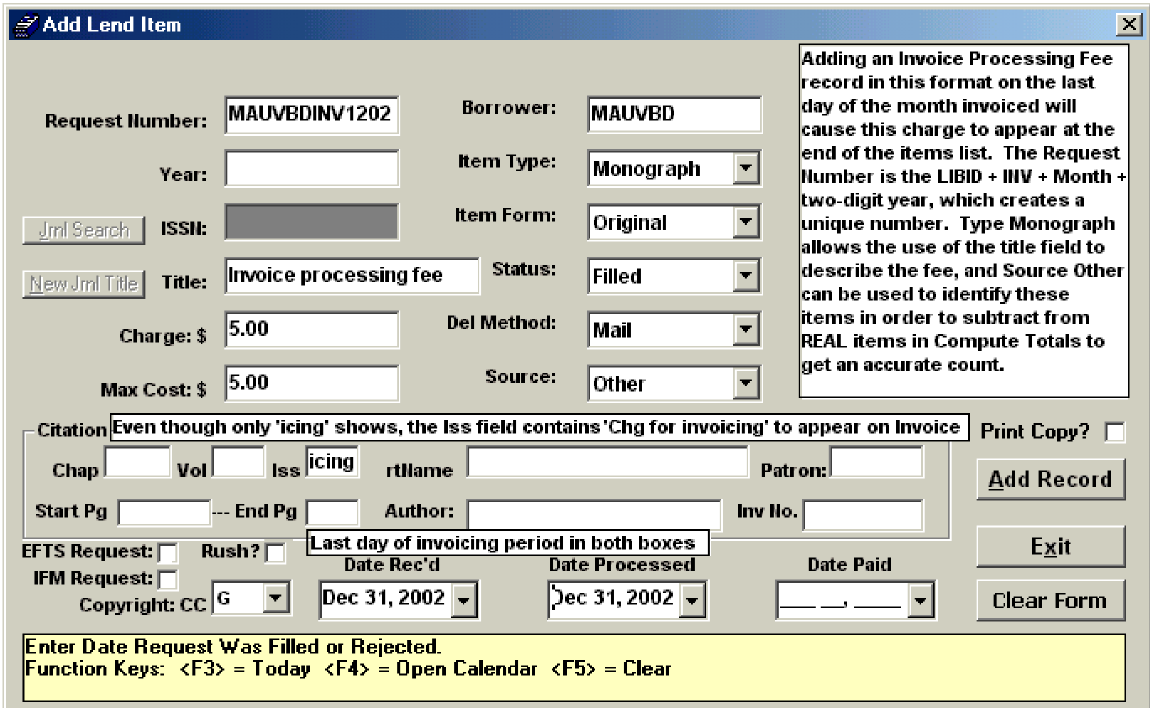
8. Status will be changed back to Filled for all; Invoices will be deleted from tblInvoices once all the Invoices items have been reset back to Filled; the Invoice column will be cleared; and these items will now be eligible for a new Invoice run on the Billing, EFTS menu.



Adding an Invoice Processing Charge to each Invoice

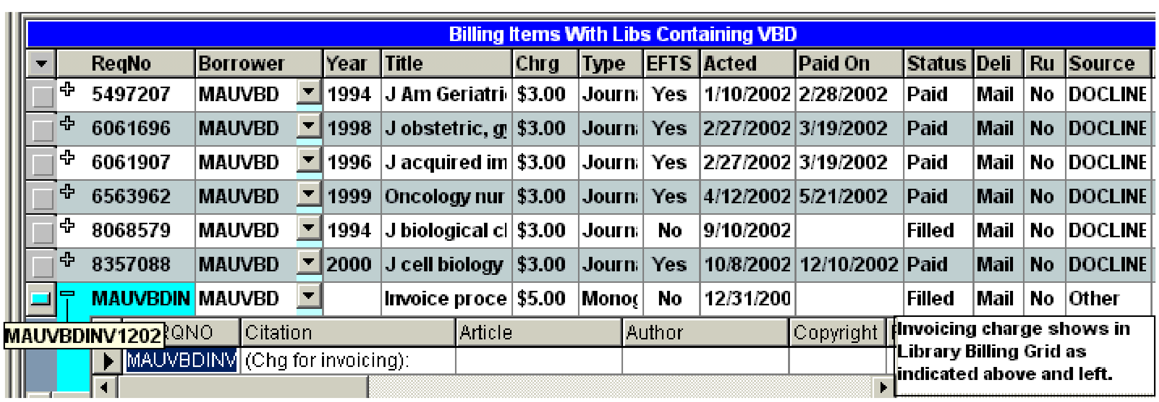
Our library director has decided to institute a fee for invoicing (in order to encourge use of EFTS instead). How do I add a $5.00 processing fee onto the invoice in QuickDOC?

One approach might be to create a special Lend Item for the processing fee and add it to the Lend Item Backfile for each library to be so charged with Received and Processed Dates of the last day of the Invoice period. Use the **Add Lend Item form** to create the item:



Use a Request Number in the format LIBID + INV + Month + two-digit year, so that the record number will be unique. Using the Monograph Type allows for using a dedicated phrase for the title, such as **Invoice processing fee**, as above. Typing **Chg for invoicing** in the Issue field will cause it to be printed in parentheses on the invoice line. Finally, if all these items are charged to a Source, such as Other, that is not used for anything else, then these ersatz items can easily be deducted from real loans in Compute Totals to arrive at actual ILL documents delivered to Borrowers.

Once the item has been added, it will show up in the Library Billing Grid as follows:



ReqNo	Borrower	Year	Title	Chrg	Type	EFTS	Acted	Paid On	Status	Deli	Ru	Source
5497207	MAUVBD	1994	J Am Geriatri	$3.00	Journ	Yes	1/10/2002	2/28/2002	Paid	Mail	No	DOCLINE
6061696	MAUVBD	1998	J obstetric, g	$3.00	Journ	Yes	2/27/2002	3/19/2002	Paid	Mail	No	DOCLINE
6061907	MAUVBD	1996	J acquired im	$3.00	Journ	Yes	2/27/2002	3/19/2002	Paid	Mail	No	DOCLINE
6563962	MAUVBD	1999	Oncology nur	$3.00	Journ	Yes	4/12/2002	5/21/2002	Paid	Mail	No	DOCLINE
8068579	MAUVBD	1994	J biological cl	$3.00	Journ	No	9/10/2002		Filled	Mail	No	DOCLINE
8357088	MAUVBD	2000	J cell biology	$3.00	Journ	Yes	10/8/2002	12/10/2002	Paid	Mail	No	DOCLINE
MAUVBDIN	MAUVBD		Invoice proce	$5.00	Monog	No	12/31/200		Filled	Mail	No	Other

RQNO	Citation	Article	Author	Copyright
MAUVBDINV	(Chg for invoicing):			

and on the invoice:

Include copy of Invoice or Inv No. with payment

EDITH N ROGERS MEMORIAL VA HOSPITAL
MEDICAL LIBRARY ILL 142D
200 SPRINGS ROAD
BEDFORD, MA 01730

Invoice Processing Fee appears at the end of the Invoice as illustrated below

Req No.	Year Title	Citation	Patron	Charge	Date Filled
8068579	1994 J biological chemistry	Sep 23;269(38):23471	Parthibha	$3.00	10-Sep-02
MAUVBDINV1202	Invoice processing fee	(Chg for invoicing):		$5.00	31-Dec-02

Total Items For MAUVBD: 2 **Total Charges: $8.00**

It might also be smart to include an insert describing the reason for the charge, and the method by which it could be averted (EFTS or IFM, etc.).

Fixing Library Charges Before Invoice Printing

The situation: I am encountering a problem regarding the fee that our library charges for ILLs. We charge $5.50 for interlibrary loan requests from other libraries, whether we send them via surface mail or fax.

I have specified this fee on our library's setup form on QuickDOC and have selected it as the default charge profile.

When I preview invoices or just view a listing of the items we have sent, QuickDOC lists our charges as $9.00 and $12.00 (fees listed in the NLM profile). How can I change this?

You should have a **Library Charge Profile** that represents that charge schedule (named something like 5.5Lib, and showing a Charge for Borrow of 5.50, Charge for Loan of 5.50 and everything else at 0). You can set this up by adding that profile under Setup on the Menu Bar, **Edit Library Charge Profiles**. Just type in the new name (5.5Lib) and add the values.

Once the profile exists, click Setup and then Setup Form, and choose the 5.5Lib profile from the dropdown box. This will make 5.50 your default charge FOR NEW LIBRARIES being created.

For those already created, though, with a different charge profile on the Charges Tab, you will have to make the change on each.

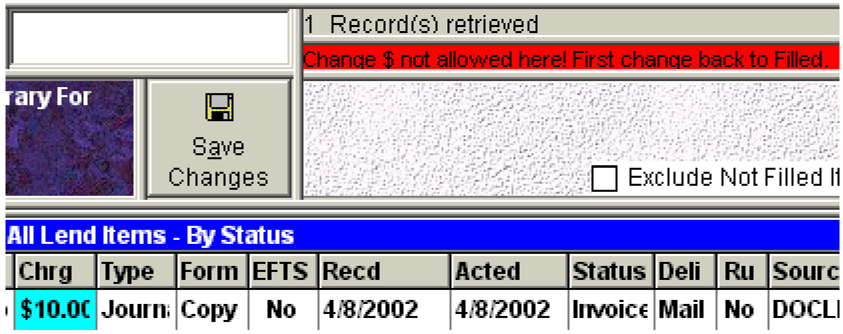
The best way to do this is on the fly. Watch the CHRG column on any new Receipt or Borrow. If you see one that says 9.00 or 12.00, and which should be 5.50, you'll know that this is one that hasn't been changed. Click on the LIBID cell for that row; this will expose a 'To Libs' button on the upper right. Click 'To Libs' and then the Charges Tab on the Library record. Change the charge profile to 5.5Lib and click Ok. This will set it up properly for the future.

We're now back on the Grid. Double-click on the 9.00 or 12.00 CHRG and change it manually to 5.50. You can also search for that LIBID and change any older ones also, as long as they haven't already been invoiced or paid.

Repeat for the next Library that needs to be updated.

Changing Library Charge after Invoice or EFTS Upload not allowed

Once an invoice is printed, or an EFTS Upload File has been created for a Library, you'll get an error message ("**Change $ not allowed here! First change back to Filled**") if you try to change the charge field. In the case below, we tried to change the $10.00 charge to $11.00:

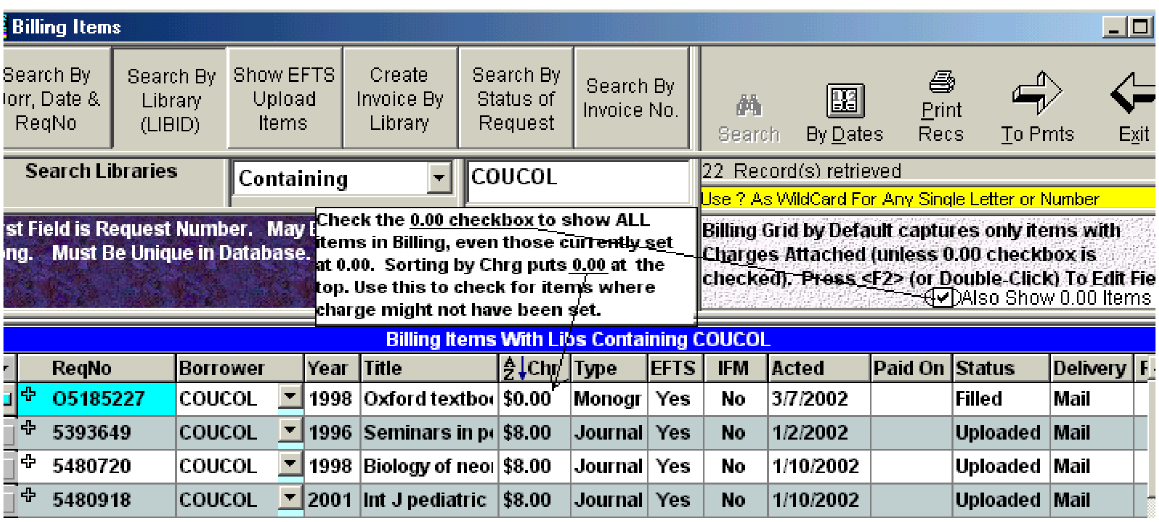


The same will occur if the Status were Uploaded to EFTS. To reset the charge (assuming you haven't already sent out the Invoice), go to the Library Billing Grid (if you're not already there), Delete the Invoice (see above), change the charge and re-run the Invoice for that Library.

Show ALL Items in the Library Billing Grid

In the Library Billing Grid, **No Charge (0.00) Items** are usually **excluded** in the records retrieved. Items must have a charge assigned in order to appear in the Grid. In some cases, though, you may want to see ALL of a Library's items for a certain period, to be sure that all items for which a charge should apply were actually charged as specified.

You can cause the Library Billing Grid to **show FREE items as well as charged items** by checking the **Also Show 0.00 Items checkbox**.



The same search, run with the checkbox unchecked, would have retrieved only 21 items for COUCOL.

Invoice Troubleshooting

The box at the top, where the Return Address, etc., should be, is empty.

First check under '**Setup**' and '**Billing Setup**' on the Menu Bar, to be sure you have values entered for the return address, etc. If these values are there (and they appear in Print Preview but not on the actual printout), then the **missing Invoice return address** values are probably the result of a layering mismatch when your printer prints the page. This seems to work for HP printers with the problem, and may wprk with others:

1. Click **Start,** then **Settings**, then **Printers** on the Win9x desktop.
2. Right-click your default printer and choose '**Properties**'.
3. Click the '**Graphics**' Tab to show the Graphics info form.

In the box at the bottom you have a choice of **'Graphics Mode**' with two option buttons: Raster Graphics and Vector Graphics. The 'What's This?' help for Vector Graphics reads:

Controls how the printing information is rendered by your printer. Using Vector Graphics can significantly increase printing speed. However, if you have problems, *such as incorrect overlaying*, trying choosing Raster Graphics.

[Italics added.] "Incorrect overlaying..." sounds about right. When we changed from Vector Graphics to Raster Graphics on our HP5, the address and other data miraculously appeared.

If all else fails, though, simply check the **Suppress Invoice Box** checkbox on the **Billing Setup** form.

It's easy enough to sacrifice the fancy box, if it obscures what lies within. Once you've registered this choice, the Invoice will be printed without the surrounding box.

Payments

Payments can be made using a variety of **Payment Methods** and **Payment Types**.

Payment Methods

These appear in a Dropdown Combo Box on the Payment Information Form, and include the usual methods of payment: Check, Credit, Cash, AMEX, Visa, MasterCard, EFTS, IFM, Transfer and others.

The Payment Methods Table is crucial to much of the database work, so please don't discard this Table (it has happened once or twice in the past). As with any necessary table, the absence of this table will interfere with normal QuickDOC processing. If you have to re-create the tblPmtMethods Table, the default values are as follows:

1. AMEX
2. Cash
3. Check
4. Credit (non-cash credit for an item---usually a result of a matching Borrow)
5. EFTS
6. IFM
7. Invoice
8. MasterCard
9. Other
10. Transfer
11. Visa
12. Deposit Acct.
13. Request (by Request Number)

Payment Types

These include:

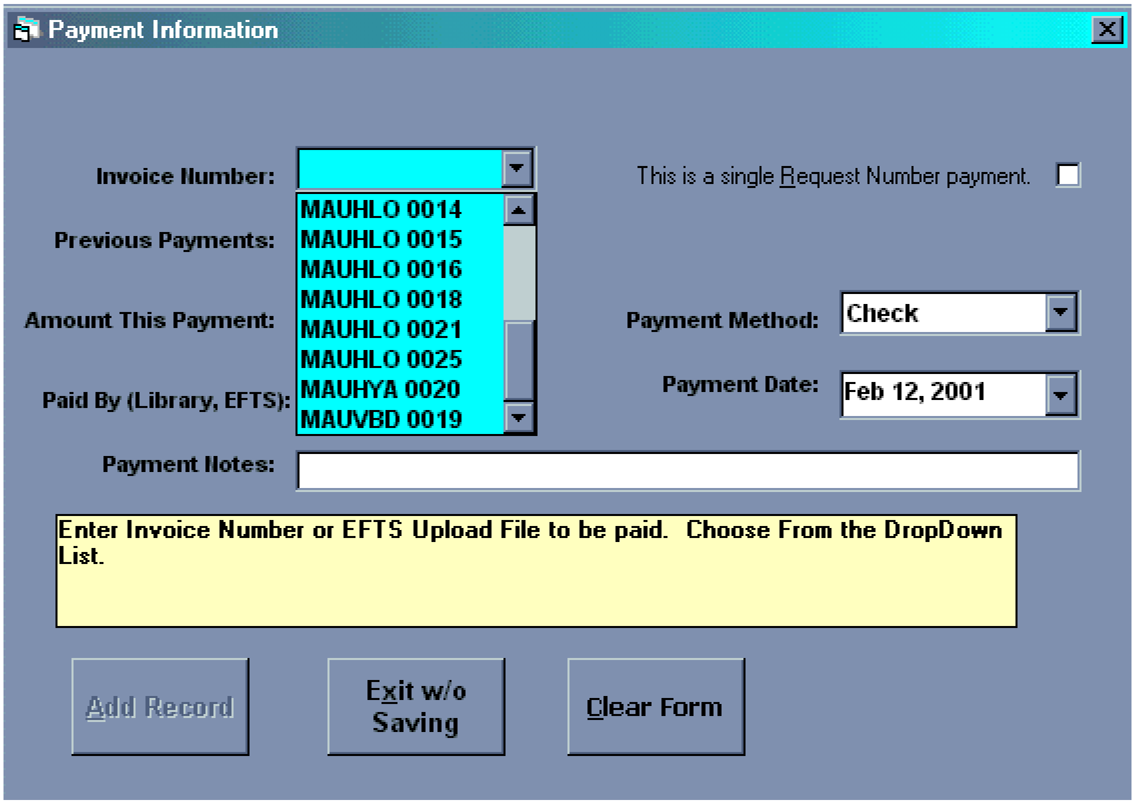
1. Invoice
2. Credit (non-cash credit to a Library---better to use a “Free Items Before Charge” type Profile)
3. Deposit Acct
4. EFTS
5. Other
6. Request (by Request Number)

Payments of all types may be made using the **Billing, EFTS** Menu Bar choice, **Payments**.

Payments By Invoice Number

From the Billing, EFTS Menu

This is the default when arriving for **Payments from the Billing, EFTS Menu**. All unpaid Invoices (along with choices for **Deposit Account** and **Credit**) are listed in the **Invoice Number Dropdown Combo Box**.



If you start typing in the Invoice Number Combo Box (and type at the rate of about a letter every .5 second or so), the box will open up at the sixth letter typed to the spot on the **Invoice List** where that Library's invoices begin (or close to it). Choosing the invoice and moving to the next field (either by pressing ENTER or clicking on it) automatically fills in most of the form: the Payment Library, the Payment Amount (as a default equal to either the Invoice Total or the Invoice Total less any previous payments, if there were any), the Payment Date (today) and a default for Payment Method (Check). Any of these can be changed, as needed.

From the Invoice Column on the Library Billing Grid

You can also **pay an Invoice from the Library Billing Grid**, by clicking on the Invoice to pay in the Grid's **Invoice column** and then the **'To Pmts'** button, but paying from the Billing, EFTS menu might be a bit faster, since the various Grid values don't have to be re-calculated and displayed after the payment is registered.

EFTS Payments

All **EFTS Uploads not yet paid are listed in the Invoice Combo Box of the Add Payment Form**. Payments are made on these in the same fashion as payments on Invoices.

If the **payment from EFTS is less than the amount projected in the Upload File**, perhaps because a Borrowing Library no longer has an account, do the following:

1. Search in the **Library Billing Grid**, By Library, for that non-EFTS Library with Begin and End Dates the same as those of the EFTS Upload being reconciled. Edit that Library's activity in the Library Billing Grid from Uploaded back to Filled (you can do this by editing the top column back to F from Uploaded and then clicking the column header to globally change every cell in the column below to Filled). **Always do this for ALL non-EFTS Libraries BEFORE registering the EFTS Payment.** This will also decrease the EFTS Payment expected by a like amount.

2. Print an Invoice for the Library, when you've reset the items back to filled, by clicking the **'Create Invoice By Library**' Ribbon Button and then the **'Search**' button. This will gather the qualifying records and clicking **'Print Invoice**' will send them to the printer using the last settings you used when printing Invoices.

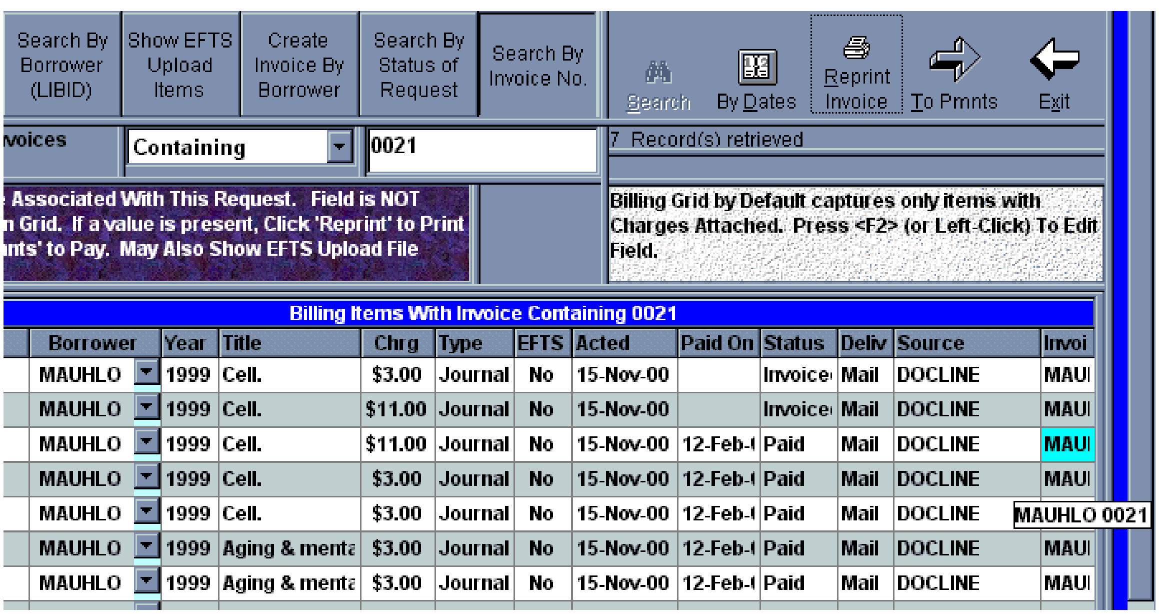
3. Once all non-reimbursing EFTS items have been edited, and proper invoices printed for those libraries, register the EFTS payment as usual on the Payments Form, either by exiting the Grid and choosing **'Payments**' from the Billing, EFTS Menu or by clicking in the **Invoice column** at the far right on the Library Billing Grid where the value is the name of the EFTS Upload file you want to pay. Once there, click **'To Pmts**' to get to the Payments Form.

This method will ensure that payments from that EFTS check, when it is finally registered on the Payments Form, will then be directed to the proper EFTS items in the list.

EFTS Credits are created to balance charges previously subtracted in error from a Borrower's EFTS account. The original item will still be carried as Paid, at the charge first uploaded; the EFTS Credit Item is a separate item in the Lend Items file, with a negative charge to match the amount credited. Once it is uploaded with the next EFTS Upload, it will be "paid" along with the other items in the check received as a result. See the EFTS Add Credit Form for more information.

Partial Payments on Invoices

Partial payments are filed with the Invoice, but the invoice is left open for future activity. Partial payments are reflected in item activity up to the last full payment for each item. If there isn't enough left over to fully pay the item, it's left marked as "Invoiced" rather than "Paid" although the full payment amount is applied to the Invoice itself. In the following example, Invoice MAUHLO 0021 has had a payment of $25.00 applied to the full Invoice Total of $37.00. Searching the Invoice Number on the Library Billing Grid gives this presentation:



Borrower	Year	Title	Chrg	Type	EFTS	Acted	Paid On	Status	Deliv	Source	Invoi
MAUHLO	1999	Cell.	$3.00	Journal	No	15-Nov-00		Invoice	Mail	DOCLINE	MAUI
MAUHLO	1999	Cell.	$11.00	Journal	No	15-Nov-00		Invoice	Mail	DOCLINE	MAUI
MAUHLO	1999	Cell.	$11.00	Journal	No	15-Nov-00	12-Feb-(	Paid	Mail	DOCLINE	MAUI
MAUHLO	1999	Cell.	$3.00	Journal	No	15-Nov-00	12-Feb-(	Paid	Mail	DOCLINE	MAUI
MAUHLO	1999	Cell.	$3.00	Journal	No	15-Nov-00	12-Feb-(	Paid	Mail	DOCLINE	MAUHLO 0021
MAUHLO	1999	Aging & menta	$3.00	Journal	No	15-Nov-00	12-Feb-(	Paid	Mail	DOCLINE	MAUI
MAUHLO	1999	Aging & menta	$3.00	Journal	No	15-Nov-00	12-Feb-(	Paid	Mail	DOCLINE	MAUI

Notice that the payment amount of $25.00 was applied to each request until the charge for the request was greater than the amount left over from the payment (the requests will be marked paid in chronological order, but since these were all on the same day it doesn't matter). The $11.00 charge in the second row exceeded the $2.00 left from the $25.00 payment after the bottom five rows were marked. Since this $2.00 credit remains with the Invoice, it will be fully paid with another payment of $12.00 (even though it looks like they owe $14.00, from the display above).

An easy way to check this would be to click the '**Reprint Invoice**' button, which will result in a reprint of all seven items, but with the **Invoice Total: $12.00** at the top (rather than the original $37.00) and at the end, rather than the usual "Total Charges: $37.00" that completes a first invoice, there will be three lines at the end of a Reprint with payments applied:

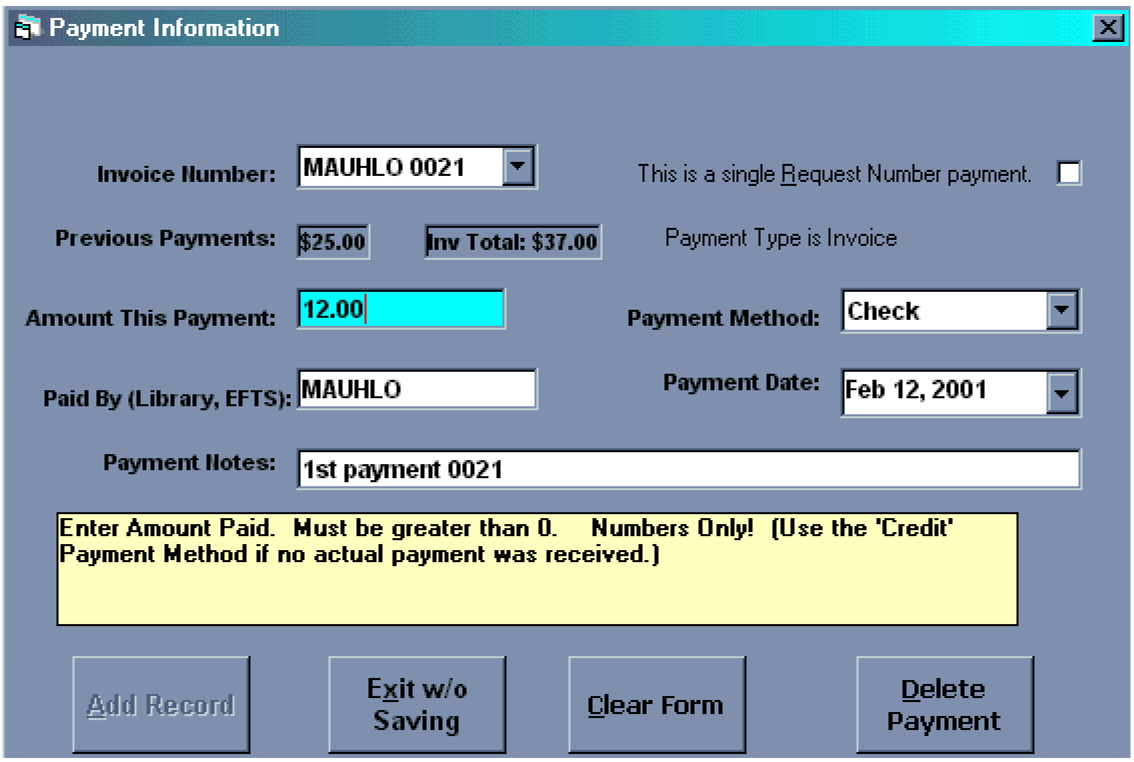
Total Charges: $37.00

Amount Paid: $25.00

Amount Due: $12.00

The **Reprint Invoice button can be used in this way to fire off a quick reminder** of an underpayment, as well as a second notice when there is no payment at all.

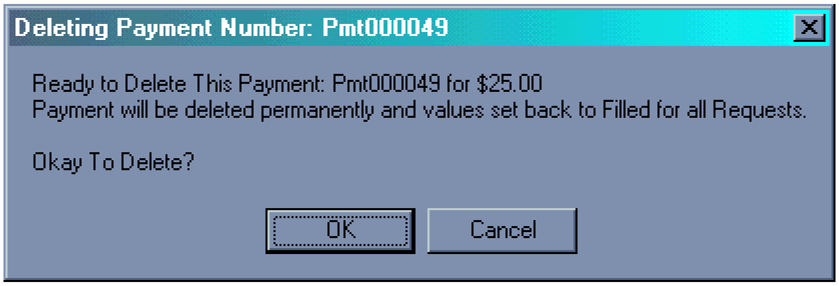
When the final payment is received and the Payment form brought up again to that invoice number, information from the first payment will reappear:



The Payment Note shows the note left with the first payment, for information only, and will be changed when filing this second payment. The '**Add Record**' button will be enabled once the suggested "12.00" payment amount is accepted (by pressing ENTER or moving to another field) or some other value is entered instead.

Delete Payment made to Invoice

If a previous payment is shown on the Payment Form, it can be deleted and then re-entered by clicking the '**Delete Payment**' button. If more than one payment has been applied to this invoice, the last payment applied is the one queued up for deleting. In the case of the form above, where we're poised to add the final 12.00 payment, clicking 'Delete Payment' brings the previous payment up for possible deletion. Check the Message Box information carefully to be sure the proper payment is being deleted (although it's easy enough to add it back in again if you make a mistake):

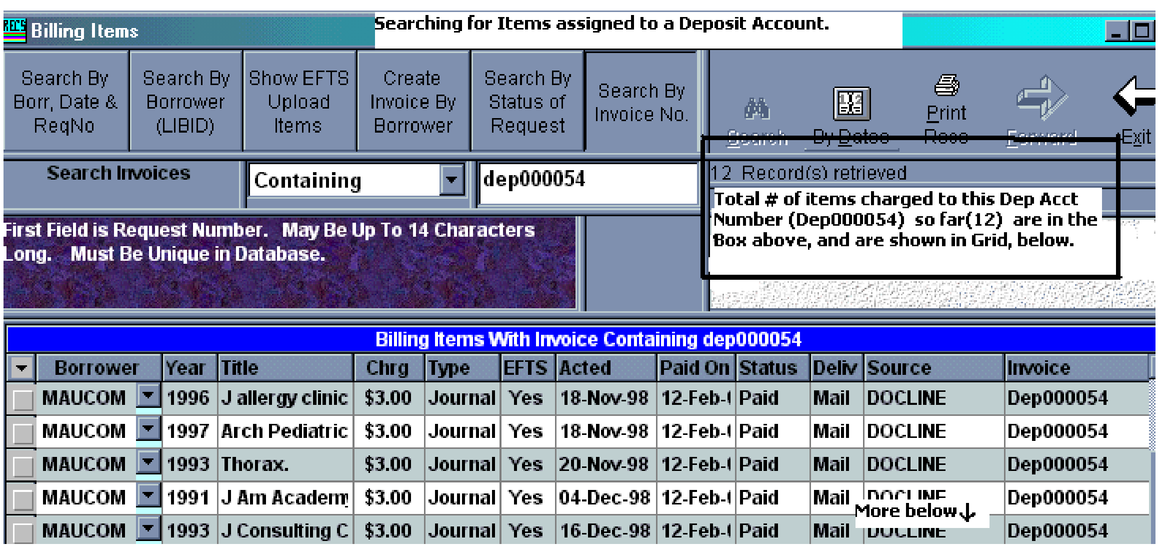


It's the previous $25.00 payment, in the case above, that has been queued up for deletion. When a payment is deleted, the Invoice is restored to its previous values, and any requests that had been marked "Paid" are reset back to "Invoiced."

Payments By Deposit Account

Use the '**Deposit Account**' choice in the Invoices Dropdown Combo Box on the Payments form to register a payment as a **Deposit Account payment**. Right after the payment is added, QuickDOC performs a search to see if there any outstanding items still marked as Filled that might be paid from this deposit. It won't alter any items that have already been changed to "Invoiced" or "Uploaded to EFTS" but it will go ahead and pay off any non-uploaded Filled Requests, even if their EFTS flag is set to Yes. This makes the assumption that, even if the Library is an EFTS customer, it makes sense to first debit the Deposit Account before returning to payments made from EFTS Upload events. A bird in the hand, etc.

Items paid from Deposit Accounts are available for searching via the Invoices column of the Library Billing Grid, since notations are made there when items are deducted from a Deposit Account, referencing the Deposit Account number. A search on this field is a quick way to get a list and printout of any items charged to specific Deposit Account:



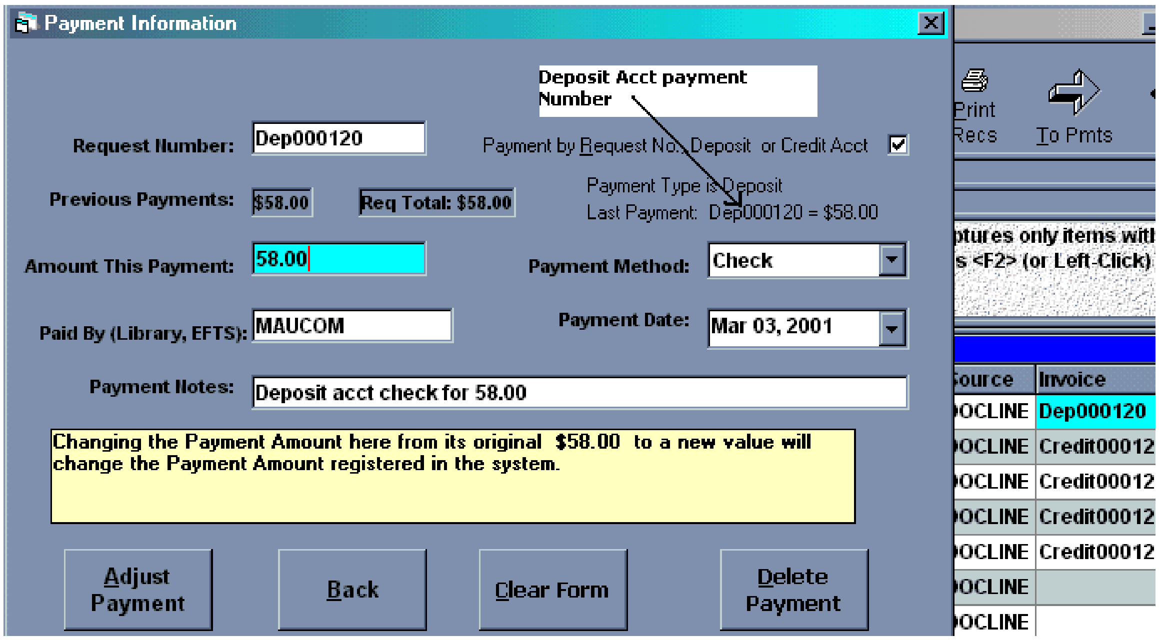
There is also a **table of Deposit Account activity (tblDeposits**), with individual line items for each activity item.

Deposit Account Automatic Payment of Items begins within the year.

After the Deposit Acct payment is registered, unpaid Filled requests are paid from the **Deposit Account payment beginning** either **six months prior to Today's Date, or at the beginning of the current year, whichever is greater**. This is to prevent this year's Deposit Account payment from being applied to a superannuated request that might have been left at Filled some years previously. You can cause earlier requests to be paid from the Deposit Account by marking them as Paid in the Library Billing Grid. Items changed to **Paid** on the Grid are always first checked against a Deposit or Credit Account balance and assigned to that payment if possible.

Delete or Adjust Deposit Account Payment.

If a mistake is made when entering a Deposit Account payment, you can **delete or adjust the deposit payment itself** (rather than each item assigned to the account) as follows:



1. Get to the Payments Form either from the Library Billing Grid or Billing, EFTS Menu.
2. Uncheck the '**Payment by Request No., Deposit or Credit Acct'** box, if it's checked.
3. Enter the **Deposit Account payment number** (usually something like Dep000123) in the box to the left and press ENTER.
4. Either edit the '**Amount This Payment**' box, or click '**Delete Payment'** to begin again.

Deleting and re-entering is probably the preferred method, in which case all the values of the payment will be new. If you choose to edit the payment amount, only that value will change in the payment record. In both cases, any rollbacks or additions to items paid will be performed on requests affected.

Payments By Credit

The **Credit payment** is another choice available in the Invoices Combo Box. It's usually used as a way to input a reduction in charge, usually as a result of a reciprocal agreement, where the cost of items we've borrowed from you are used to adjust our charge for items we've loaned to you. It can be used as an unofficial Deposit Account where, for example, a Borrowing Library can be assigned $200 worth of free items at the beginning of the year. Then, as items are provided to this library, the charge normally applied is instead deducted from the January credit total. When the credit total is used up, items begin showing up as candidates for either Invoices or EFTS uploads.

There's no line item table for these events---although there is a tblCredits that keeps just the running total. These are paired off with matching items that can thereby be marked as Paid as they occur. On the Library Billing Grid, the Invoice column for these items will have a notation of "Credit" plus the Library name.

Items are deducted from the Credits Table only if there's enough in there for that library to cover the total charge of the request. As with Deposit Accounts, requests paid from the Credits Table are marked Paid automatically, at the time they're updated as filled on DOCLINE, using the Charge that was filed with the request when it was Received. It will be a good idea to make sure that these charges are the correct ones, although incorrect charges can be changed at any time (if a charge is changed on any Grid for an item that has been marked as Paid from a Credit account, that change will be percolated back into the **Credits Table**---and Deposits Table for Deposit Accounts---at the time the change is recorded).

If the remainder in the Credit Table is less than the cost of the item, it just sits there, waiting for an item it can cover, and the uncovered item remains marked "Filled" and is a candidate for the next Invoice run or EFTS upload.

If you choose **Credit as the Payment Type** from the dropdown box, also choose **Credit from the Payment Methods combo**. This will be useful later for determining actual cash income (as opposed to barter income) received as a result of Document Delivery activity.

It's not even necessary that there be a balance in the Credits Table for a Borrower to be assigned a credit for a filled request. To assign an *ad hoc* credit for a request, you can either change the cost to FREE or, to keep a notice that this was actually a credit for the Borrower, assign the credit through the Library Billing Grid. First use the Library Billing Grid to get a list of items loaned to the library that will receive the credit. Click on a row with the item to be credited in the Grid, and then click the '**To Pmts**' button on the upper right. This will bring up the Payments Form with the Request information already filled in. Choose Payment Method "Credit" and the proper entries will be made.

Credit Payments always start with current year items.

After the Credit payment is registered, unpaid Filled requests are paid from the **Credit payment starting at the beginning of the current year**. This is to prevent this year's Credit payment from being applied to an item from last year that might have been left at Filled for other reasons. Credit payments are always assumed to be for the current year. You can cause earlier requests to be paid from the Credit by marking them as Paid in the Library Billing Grid. Items changed to **Paid** on the Grid are always first checked against a Credit or Deposit Account balance and assigned to that payment if possible.

Credit Payment Type vs. Credit Payment Method

The **Credit Payment Type** appears in the Invoice Combo Box, along with Deposit Account, as a choice along with the list of all unpaid Invoices and EFTS Upload files. The **Credit Payment Method** appears in the Payment Methods Combo List.

If you enter an amount with the **Credit Payment Type**, it will be added to the total available for the Library making the payment in the **Credits Table**. The Payment Method might be Check or AMEX or Transfer or whatever (even Credit, although this choice will cause the inference that no funds actually changed hands). If you use the **Credit Payment Method** with a Payment Type other than Credit, the payment will be applied to the Request, Invoice or Upload cited, but no change will be made to the balance, if any, in the **Credits Table**.

Some typical uses of the **Credit Payment Method** appear in the Table below:

Payment Amt	Payment Type	Method	Result
$100.00	Credit	Credit	Charge for any outstanding items will be subtracted first and those items marked as paid; remainder added to Credits Table
$100.00	Request	Credit	Cost of Request deducted from payment amount and item marked paid;

			remainder of credit discarded as unused.
$100.00	Invoice	Credit	Unpaid Invoice Charges assigned as paid from payment amount (up to total of payment) and items affected marked paid; remainder of credit, if any, is discarded as unused.
$100.00	Deposit Account	Credit	Since no actual payment took place, use the Payment Type **Credit**, as in the top row, above, instead of Deposit Account.

Delete or Adjust Credit Account Payment.

If a mistake is made when entering a Credit Account payment, the payment itself (rather than each item assigned to the account) can be deleted or edited as follows:

1. Get to the Payments Form either from the Library Billing Grid or Billing, EFTS Menu.
2. Uncheck the '**Payment by Request No., Deposit or Credit Acct'** box, if it's checked.
3. Enter the **Credit Account payment number** (usually something like Credit000123) in the box to the left and press ENTER.
4. Either edit the '**Amount This Payment**' box, or click '**Delete Payment'** to begin again.

Deleting and re-entering is absolutely the preferred method for editing credits, in which case all the values of the payment will be new. If you choose to edit the payment amount, only that value will change in the payment record. In both cases, any rollbacks or additions to items paid will be performed on requests affected.

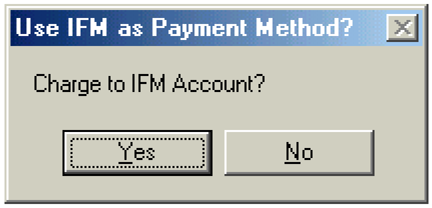
Payments By Request Number

Payments by Request Number can be recorded on the Payments Form, **from the Billing, EFTS menu**, by clicking on the "**single Request Number**" check box and typing in the Request Number itself, but it's a bit easier to do it **from the Library Billing Grid** or even the **Lend Item Backfile Grid**. Click on the row with the item to be paid in the Grid, and then click the '**To Pmts**' button on the upper right. This will bring up the Payments Form with the Request information already filled in. Choose the appropriate Payment Method and amount, etc., then click '**Add Payment**' to save. The Payment Number assigned will be available in the Invoice column of the Library Billing Grid.

Marking an item as Paid in the Status column of Grid

You can record a quick **payment by changing the Status column on either the Library Billing or Lend Item Backfile Grid** directly, editing it from Filled to Paid. The '**Paid On**' column will be changed automatically to Today's Date, if left blank, or it can also be changed before filing---using either the calendar dropdown or by entering the date correctly---to the correct date for that payment.

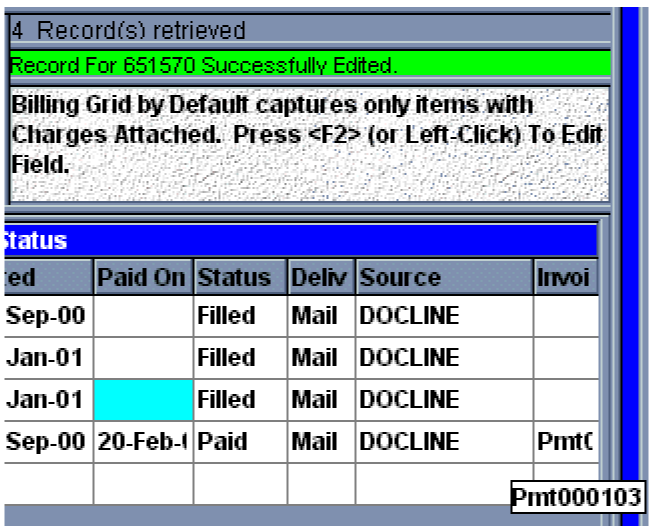
If your own Library record indicates that you participate in OCLC's IFM system, you will be asked whether this payment is an IFM payment:



If it is, you will also get a chance to input a note regarding the IFM payment. This item will be filed in the tblPayments Table as **Payment Method IFM**.

Non-IFM items marked as Paid in this way have no other supporting information (no Check Number in Notes, no specific Payment information). A payment entry is recorded, though, with the Request Number as identifier, **Payment Method Other** and Payment Amount equal to the Request Charge.

The **Payment Type** for both IFM and Other payments is **Request**. It is also assigned a **Payment Number**, which will appear in the Invoice Column of the Grid:



Items marked as Paid in this fashion are still run by the Credits and Deposits Tables, to see whether the amounts should be deducted from these totals, but no other checks are made. The Payment Method "Other" may represent a real payment or a credit; since there's no way to tell for sure, it's assumed to be a true payment.

Any payment can be edited later to correct payment amounts only, or simply deleted and re-posted to correct any and all values.

Marking an item as Paid by entering a Date Paid

You can also record a quick **payment by entering a value in the DTPD column on the Library Billing Grid** directly; this will cause the Status to be changed to Paid when the row is saved, along with all the other activities described under the Status change, above.

EFTS Activity

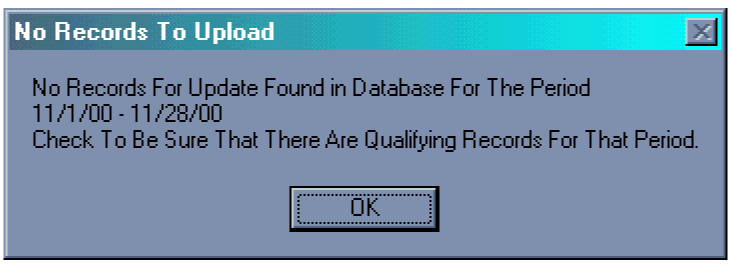
EFTS File Uploads

Criteria for inclusion in an EFTS Upload File

As with Invoices, there are certain **criteria that determine whether an item is included in an EFTS Upload file**.

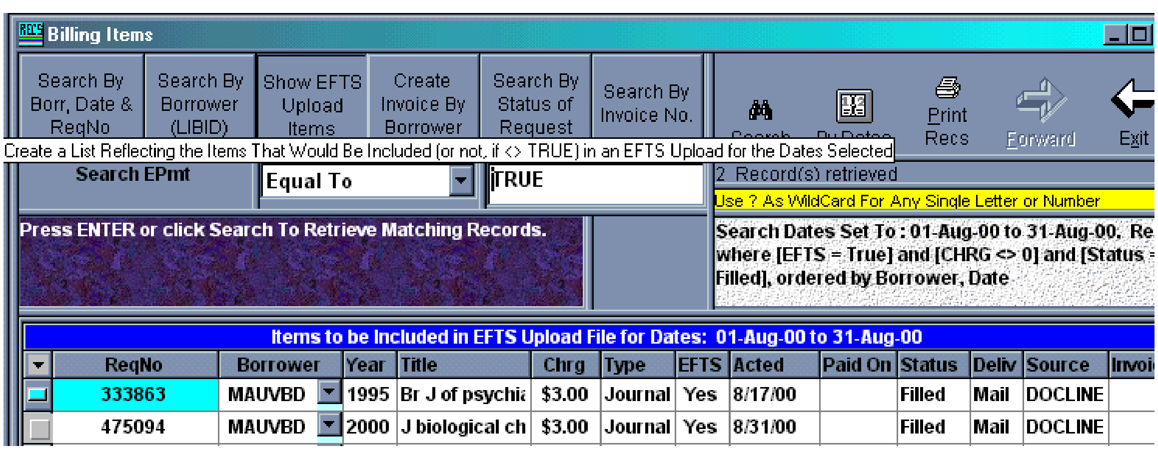
1. **Borrower** must be an **EFTS Library** (its **EFTS Payment Supported checkbox**, on the Charges Tab of the Library record, should be checked).
2. **Your Library** must be an **EFTS Library** (your **EFTS Payment Supported checkbox** should be checked).
3. The item must have a **Charge** (or Credit) other than 0.00
4. **EFTS** must be **Yes** on the item record.
5. **Status** must read **Filled**.
6. The item must have been **Acted Upon during the time period in question.**

If any one of these criteria is not met, the item won't be included in the upload. If there are no items in the time period specified that meet all three criteria, you'll see the following Message Box:



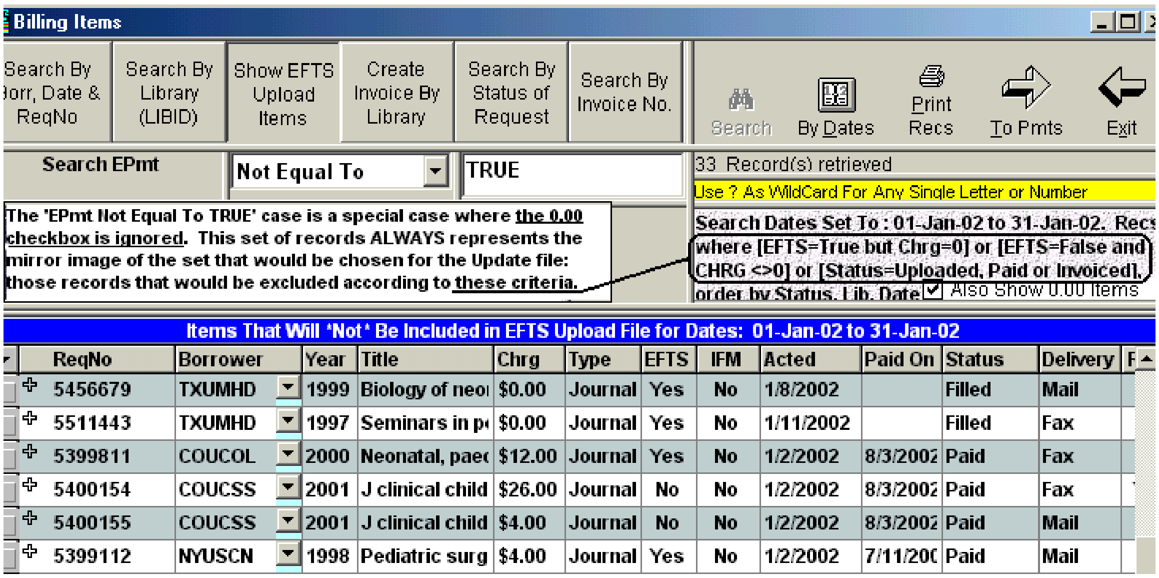
Steps for Creating the EFTS Upload File

Before creating the file, you can **use the Billing Grid to determine which items will be included in the EFTS upload**. Set the Dates for the Upload and click the **Show EFTS Upload Items Ribbon Button**. The default search criteria will appear in the box to the right.



These are the items that will be included in the upload file as the values currently stand.

In order to be sure that items that should have been included in the upload file weren't left off because one of the required values has been set improperly, you can also search the '**Show EFTS Upload Items**' Ribbon Button with a value **Not Equal To TRUE**. This setting attempts to show records that display common characteristics of misfiled EFTS requests, including: items marked EFTS but with a charge equal to FREE; items with a charge but with EFTS = No; and also any item whose status is **Invoiced, Uploaded** or **Paid**, since these also will not be included in an upload. The **'Not Equal To True'** setting will produce a list something like this one:



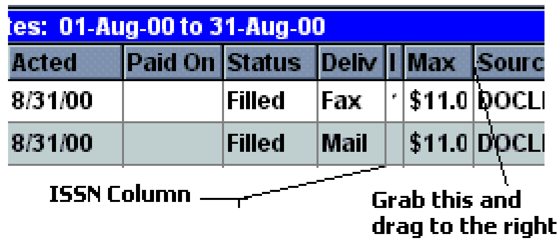
The list is sorted first by status since the Filled requests are the more likely candidates for change (those marked Invoiced, Uploaded or Paid were most likely set that way on purpose, but they're included here primarily to answer questions as to whether an earlier upload might have been done, or whether Invoices might have been produced for certain Libraries, which would have removed them for consideration during the preparation of the Upload File). The state of the **Also Show 0.00 checkbox** has **no effect** on this display.

In the case above, if the two TXUMHD requests should have been charged a $10.00 fee instead of the FREE displayed, you can edit the CHRG cells to $10.00 to make them eligible for the Upload file. If the Max Cost field for these requests is less than $10.00, a message box will let you know. It is also possible to check the Max Cost Value on the Grid by exposing the Max Cost column itself, which is normally hidden on the Billing Grid but which is always there nonetheless.

Exposing the Max Cost Column on the Billing Grid

There are in fact two columns hiding between the '**Delivery Method**' and '**Source**' columns, above: ISSN and Max Cost. If you drag the vertical line between **Deliv** and **Source** to the right, you'll first expose the ISSN column. Since we're not interested in this column at present, only a wee bit of it needs to be seen. If you let go of the left mouse button you've used to grab the first header border, and use it to grab the newly exposed border between **ISSN** and **Source**, you'll **uncover the Max Cost field**.

As you can see below, the **Max Cost** was $11.00, so editing of the two requests to a Charge of $3.00 will be permitted (the **Max Cost field is not an editable field**, by the way, so you can't unilaterally change the Max Cost to meet your charge; according to general DOCLINE guidelines, if your charge is greater than the Max Cost attached to the request, you shouldn't fill it).

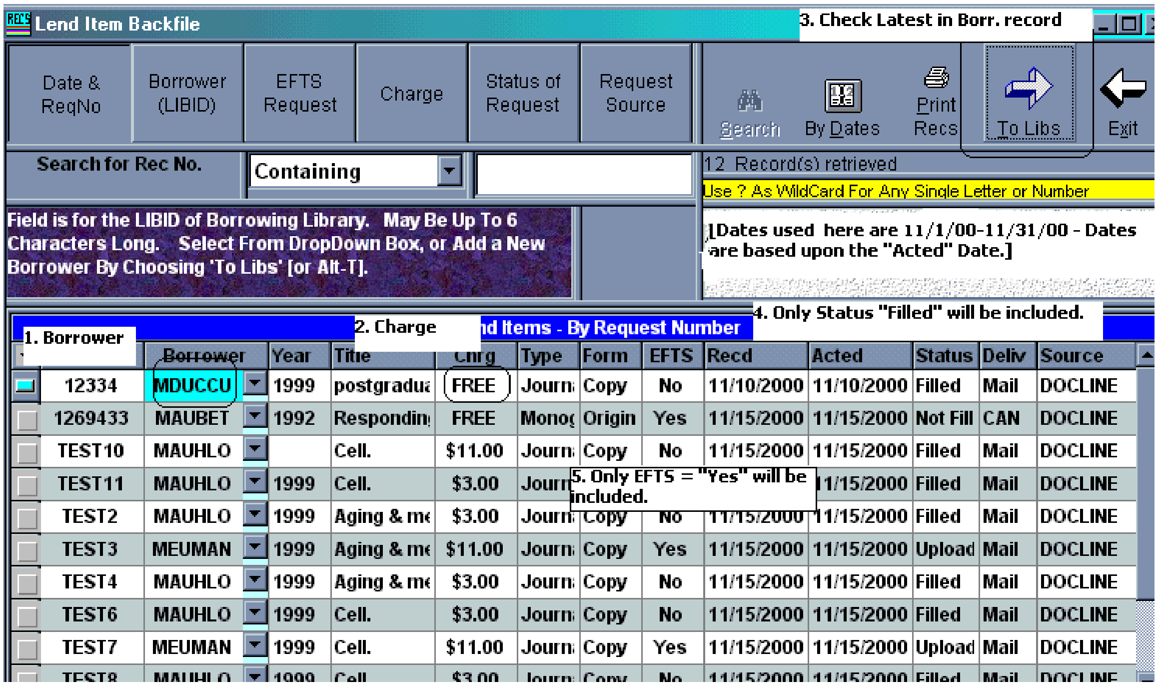


You can edit values on the Grid and try again, but be careful not to upload the same item twice (although duplicates will be weeded out at the RML end, it just confuses the issue to have them there).

If you use the **Billing Grid's 'Show EFTS Upload Items',** you get a streamlined version of the steps to take in preparing an upload file for activity during any period selected. For a display of all items during the period in question, you can use the **Search All Grid** to get the complete population of requests, and can then do editing on those that need it. Also, once you have the dates set here, experiment with limiting the set by various search criteria, to see whether the subset delivered meets your expectations. Some examples:

1. Check **Status Equals Filled** to see if the number returned seems about right.
2. Check **Status Equals Uploaded** or **Invoiced** to see if operations have already occurred against this group.
3. Check **Charge Equals FREE** to see if there are requests in the group for which there should have been a charge that were mistakenly filed as FREE.
4. Search **Specific Borrowers**---those that may have been problematic in the past---to see how they show up on the Grid [if you click the **Borrower (LIBID) Ribbon Button**, and enter the SERHOLD 3-letter code in the Search Box, along with **Containing** as the search criterion, you'll get a quick list of all items for that library during the time in question].
5. Search **EFTS Not Equal To TRUE** to see whether any of these requests are actually eligible for EFTS uploads (the set returned should be sorted by Borrower to provide for quick scanning.
6. Search **EFTS Equals TRUE** just before creating the upload file, to weed out any outside libraries that may have made it onto the list. Non-EFTS Libraries whose items are mistakenly labeled EFTS = TRUE won't be picked up on Invoices, so it makes sense to make this value as accurate as possible.

On the following Grid display, for example, none of these items would qualify for an EFTS Upload File, for the reasons enumerated:

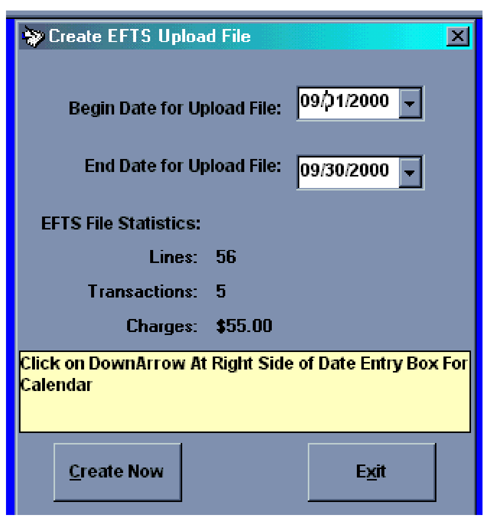


Only 3 items are (EFTS = Yes) and two of these were already uploaded while the other is Not Filled. Charge of FREE will be excluded, etc.

Once you've checked the file and made any changes necessary in preparation for the upload, use either the **Toolbar Button** or the Menu choice under **Billing, EFTS Menu** to get to …

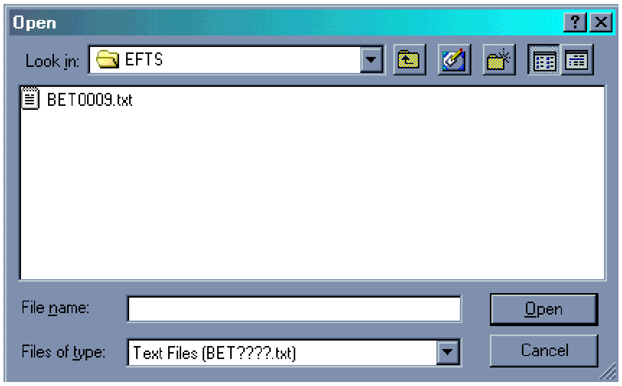
The Make EFTS File Form

The **Make EFTS Form creates the EFTS upload file** for the period specified. Statistics for the upload file are displayed when it's finished.

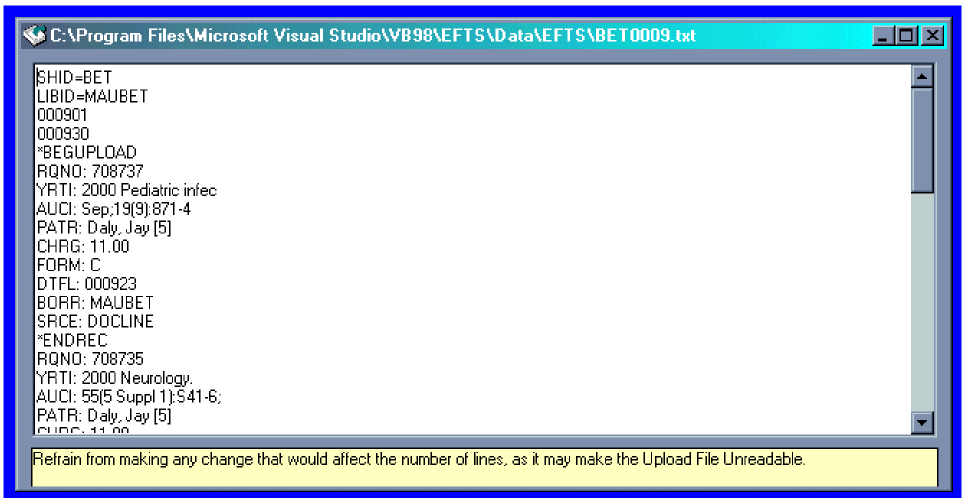


The EFTS File List Form

The **EFTS File List Form gives access to EFTS files created**. Once the files are made, you can check them out and even do a little light editing, though I wouldn't recommend being too adventuresome.



If you choose to open the BET0009.txt file, above, it would look like this:



At the moment, these files must be uploaded to EFTS separately, but I hope to have that capability integrated by 1.6 or 1.7. **EFTS Upload files can be sent via ftp to the EFTS site, or attached to an email message**. Every EFTS user has an ID and password that's used to access the system. The ID is usually something along the lines of your old DOCLINE LIBID with a lower-case u in front, but the password will be something unique, of course. You might need to get in touch with your RML or the central EFTS site if you can't find paperwork for these values locally.

Once you've got that, it's a simple matter to log in and "put" the file in your dedicated directory (which is where you'll be when you log in). How you do this will vary according to your ftp program, but remember to **use ASCII, not binary, transfer, since the EFTS Upload File is a plain text file**.

As regards the email attachment method, Ed Donnald from UCHC wrote in November, 2000:

> If you are having trouble with the ftp part but the file is created, you may attach it to an email and send us the file so we can include it in the processing for this month, giving you another month to work out the ftp process.

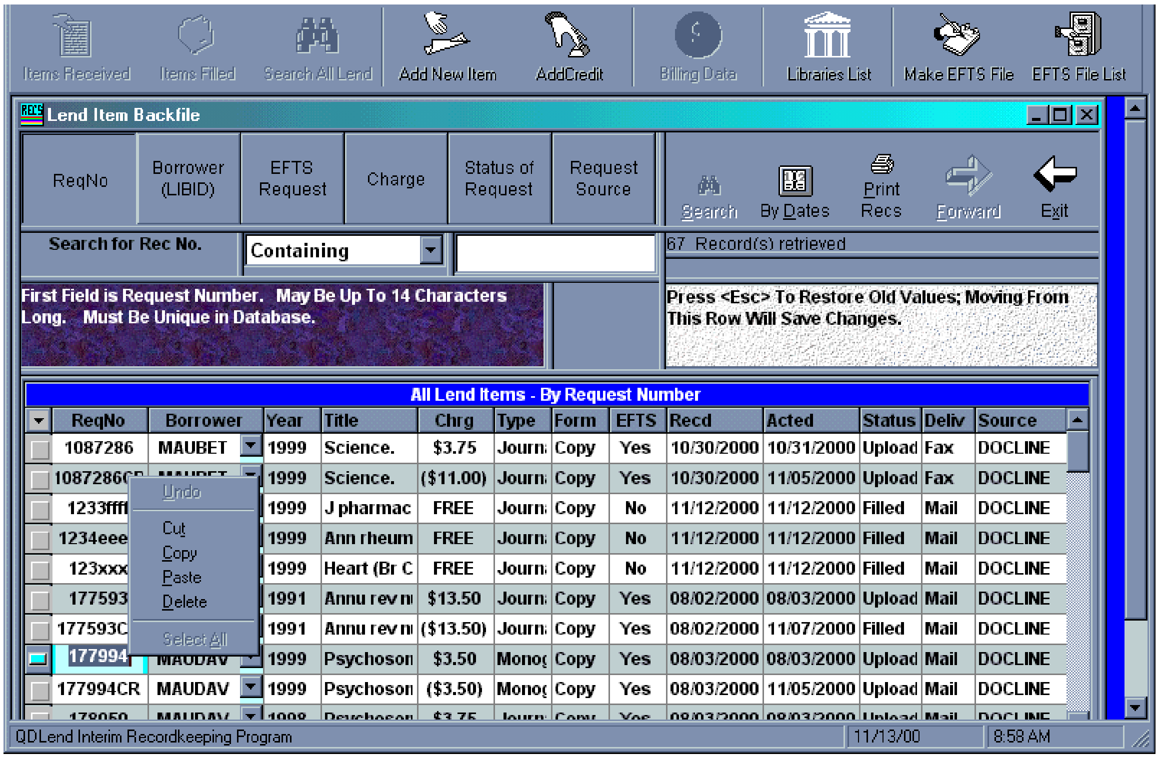
EFTS Email Address is: efts@uchc.edu.

EFTS Web Site is at: http://efts.uchc.edu/.

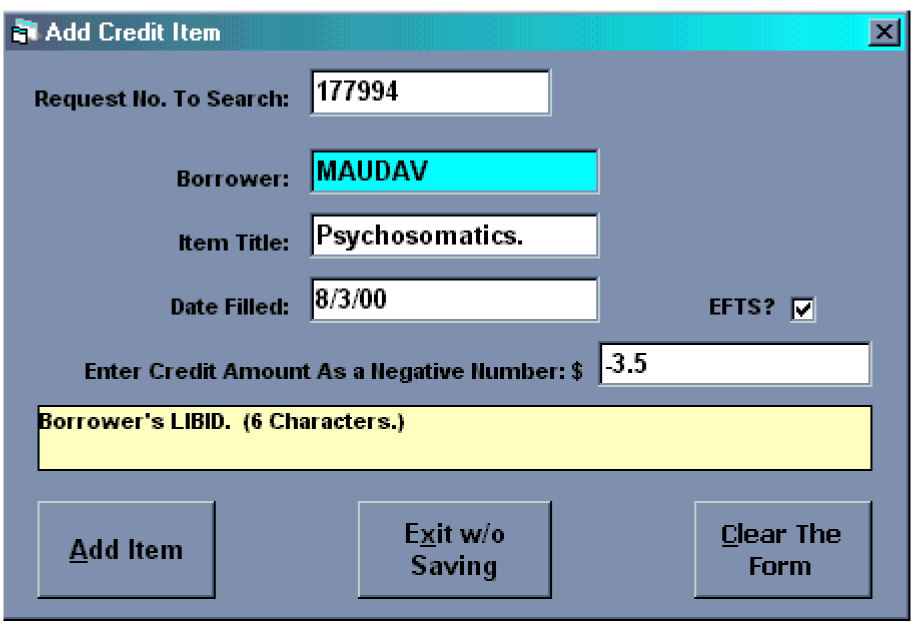
Whether email will continue as an optional method is unclear, but QuickDOC should include an automatic ftp capability relatively soon.

The EFTS Add Credit Form

When an EFTS user has been charged in error during a previous upload, the error is fixed by **adding a credit to the next EFTS upload file**. The easiest way to accomplish this is to first find the item for which you want to register a credit on the Search All Grid. Then highlight the Request Number field and right-click on it, as was done for 177994, below.



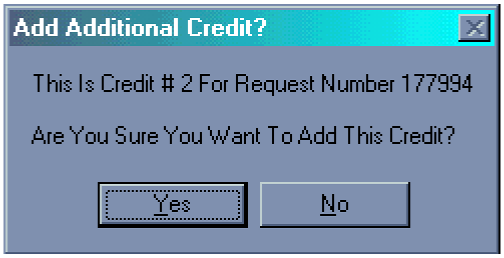
Choose **Copy**. Then click on the **Add Credit button** on the Toolbar, which will bring up the **Add Credit** form. Right-click in the "**Request Number To Search**" box and choose **Paste**.



This process **automatically fills in the required fields with information from the original request** (the **EFTS Credit Amount defaults to a credit for whatever the actual charge was** on the original request).

While you can create a credit unilaterally (i.e., without a Request Number that was initially charged for), it makes sense both for ease of use and comprehensibility to use this method if possible.

If you attempt to add a second credit where one has already been applied, you'll see a Message box:



You can click Yes and add the second credit, or you can pull back if it seems that this second one might be a duplicate.

How To Setup EFTS Routing Table

The July 2002 issue of *National Network*, the newsletter of MLA's Hospital Libraries Section, has an article by Beth Wescott, Joanne Jahr, and Julie Kwan about **EFTS and DOCLINE Routing Tables**. Here are some of the ideas for EFTS participants from that article:

1. Place libraries with whom you have reciprocal arrangements, and who will not charge you, low in your routing table;
2. Place EFTS libraries low in your routing table, putting those with lower fees before those with higher fees;
3. Put smaller EFTS libraries lower than larger EFTS libraries so that smaller libraries have the opportunity to participate in lending, thereby offsetting their borrowing charges;
4. If some of the EFTS libraries offer a preferred delivery method, such as web or email delivery and you want that method, place them lower in your routing table;
5. If you need special collections, try to find EFTS libraries that have those materials and place them appropriately in your routing table; and,
6. It's generally good practice to ask before adding an out-of-region EFTS library to your routing table.

Borrow Function

Borrow Information in the Database

Information on items loaned is held primarily in the **tblBorrowItems** Table in QuickDOC.MDB. Associated bibliographic information for any item is held in the **tblBorrBibs** Table. Local charge information for any item is held in the **tblBorrLocals** Table. Information on Borrow activity is displayed in a Grid format, available by clicking the **Borrow button on the Main Tool Bar** or by clicking Lookup on the Menu Bar and choosing **Items Borrowed**.

Date Format Used in Searching

In order to evaluate dates uniformly, QuickDOC uses a Short Date format based on the Regional Settings of the machine on which it is being run (e.g., 23-Sep-2001 will display as 09/23/2001 in English – U.S. format; as 23/09/2001 in English – Canada format, etc.). Dates displayed in most cases will use this format.

(Because of an idiosyncracy of SQL Queries on Access-type databases, all SQL Search Dates are re-formatted to English – U.S. for search purposes only, but this will have no effect on the local format used or on the format displayed in QuickDOC. It will be transparent to the user.)

Dates displayed in **Calendar Date Boxes** for data entry will use the Month Day, Year format (e.g., Sep 23, 2001) so as to skirt the date format issue entirely. These controls have some degree of built-in intelligence, so that when you begin typing the month name it will often complete all three letters if there is only one possibility---as in Sep, above). You can check the local settings for your machine in the Control Panel, under **Regional Settings**.

Borrow Grids

Lists of items requested are normally displayed in Grid format, showing either current requests outstanding or those requests that have been sent and received (the Backfile), according to whatever limits are set. Searches can be limited by Date and by choices on the ribbon bars. The **Requests Outstanding Grid** is normally the first one shown, but you can toggle back and forth between Requests Outstanding and the **Borrow Item Backfile Grid** by clicking the ribbon button with the white background just above the Search Box. In addition, multiple deletes and global column changes can be accomplished on any of the Grid views**. Search Dates** selected are displayed (in local date format) in the box just above the Grid to the right, as well as in a Tool Tip when the mouse is held over the **By Dates button**.

Request Number Searching in Borrow

In all **Request Number searches**, whether made on the Requests Outstanding Grid or the Borrow Item Backfile Grid, if a part of the request number is entered in the Text Search Box (the box next to "Containing" below), then **ALL records that match that Request Number pattern and Search criterion (Containing, Equals, etc.) are retrieved**, no matter what the date of the request might be.

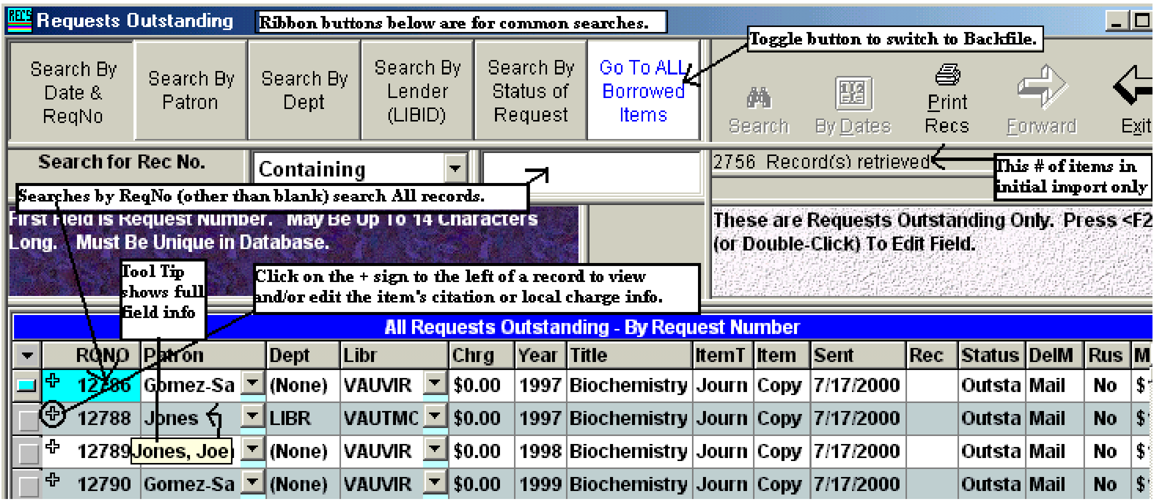
If the Text **Search Box is left blank**, then **ALL Outstanding Items** will appear in the Requests Outstanding Grid, and **ALL Items** (within the selected Date Range) will appear in the Backfile Grid. This broad-based response is unique to Request Number searching; all other searches are limited by the criteria of the Grid used and by the range of Dates Selected.

An exception to the 'All Dates' rule for Request Number is made for searches where there is something entered in the Search Box and the **Search Criterion** is **Beginning With**; **Beginning**

With Request Number Searches will adhere to the **Dates currently set for searches**. This is intended to permit the searching of various non-DOCLINE items, entered manually with all request numbers beginning with a certain phrase or letter, within the Dates specified. (E.g., if you enter all WEST CAMPUS items with a number beginning with WEST, they will be retrieved in a Date Search properly with a search strategy of 'Beginning With' WEST.)

Requests Outstanding Grid

All items that have not yet been acted upon will appear in the Outstanding Items Grid.



The Requests Outstanding Grid will be **the first Borrow Grid to appear during each session**. This is to give a brief look at the number of items still not received. As items do arrive at the library (or are sent directly to the Patron), their records should be checked in here. For the most part, except for Cancels and Loansome Doc requests filled by yourself, there is no automatic check-in possible, since only the local library can know exactly when something arrives.

Lending Library Charges – How and when are they computed?

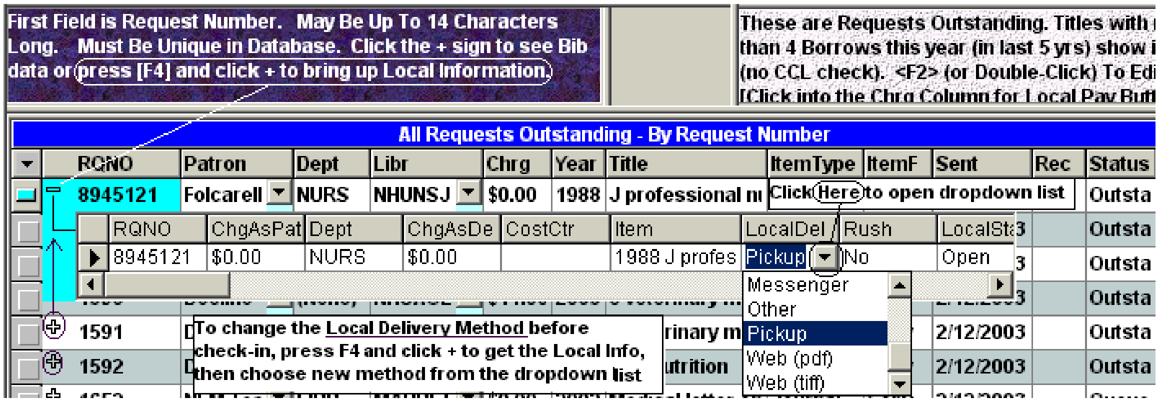
Unlike the Local Charges, which are calculated only when the item is received, the Library charge is calculated, based on the **Library Charge Profile** of the Library to which it is first sent, on first import into Requests Outstanding. It isn't automatically re-calculated thereafter unless either the **Delivery Method**, **Rush** value, or Library **LIBID** is changed. If you change a Library's Charge Profile, the new designation will take effect only on new requests; existing charges will be unchanged.

But even existing item charges will be determined by the new profile if any of the signal values (Delivery, Rush, LIBID) are changed, causing a re-calculation using the new Charge Profile. You can test this by changing a Library's Charge Profile, then changing the Delivery Method on one of that Library's items, saving changes and then changing the Delivery Method back to its original value. The new charge profile will determine the new value. And it's always possible to change the Charge value directly, by double-clicking into the **Chrg** field and entering a new amount; this new change will stick unless, of course, a later change in Library, Delivery or Rush causes a later re-calculation.

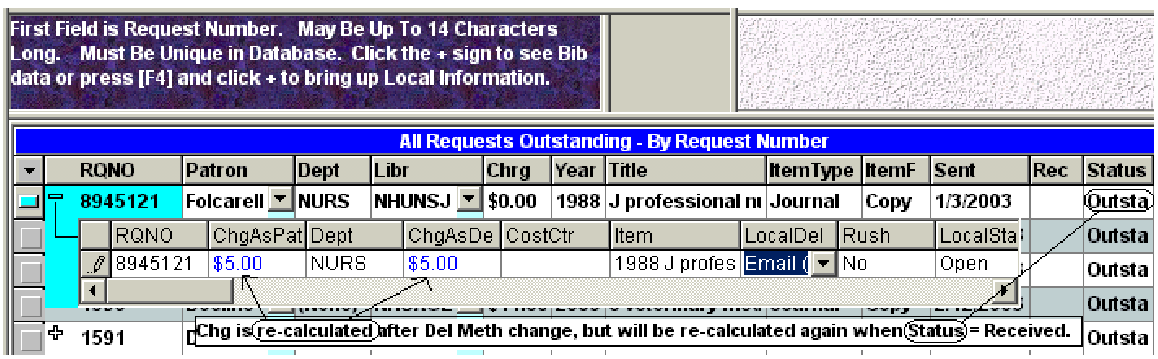
Use the F4 Key to go directly to Local Information

Clicking the + sign at the left of any row will bring up the underlying **Bibliographic** and **Local Item Information**. Bibliographic Information is the initial default, but if you click that + sign two or three times, eventually you will uncover the **Local Information Grid**.

In order to make this process a bit more accessible, if you press the **F4 Key** before clicking the **+** sign, the default will be for Local Information rather than Bibliographic. This option only occurs if the focus is in the **RQNO cell**. While this will be true in both the Requests Outstanding Grid and the Borrow Item Backfile Grid, it might be most useful in Requests Outstanding to indicate a **change in the Local Delivery Method** before the item is marked **Received**. In the case below, the F4 key was pressed before the + sign (now a – sign) was clicked:



If you **change the Local Delivery Method**, this is a key for QuickDOC to **re-calculate the Local Patron and Dept Charges** (other keys are changes to **Rush** or to the **Lending Library**), so you may see changes there as well:



In the case above, since the Status is still Outstanding, the charges will be re-calculated again when the item is **checked in** (**marked Received**). If there is no other change in Rush or Library or Delivery Method, though, the charges re-calculated will be the same as those above.

After an item has been invoiced or paid, however, all changes to **ChrgAsPatron** and **ChrgAsDept** will be ignored, as a practical matter, since the **final Local Charge is assigned at the time the Local Status is changed to Invoiced or Paid** (Patron or Department). In order to re-calculate, you must first change the **Local Status** back to **Open** (which usually means deleting an Invoice or Payment assigned to it) and then re-do the payment or invoice.

Copyright Check in Requests Outstanding Grid

For libraries located in the U.S. the Requests Outstanding Grid will highlight in red items where the Journal has already been borrowed **5 or more times during the current year**. This count **will exclude items where the year of publication is earlier than 5 years before the current year**, but it won't consult the CCL or CCG status, so it should be considered a 'heads up' rather than a final report.

The Requests Outstanding Grid also gives a 'Heads Up' if the journal title being borrowed has already been borrowed 5 or more times during the current (U.S. Copyright) year. Articles older than 5 years are excluded from the count, but the CCL or CCG status is ignored, so this is NOT a CCC report (run the Copyright Report - (U.S. CCC) for that). Non-U.S. Libraries will see any title (no matter when published) borrowed more than 4 times during the current year, FYI.

43 Record(s) retrieved

In most cases, the check year begins 1/1/thisyear.

These are Requests Outstanding. Titles with more than 4 Borrows this year (in last 5 yrs) show in Red (no CCL check). <F2> (or Double-Click) To Edit Field. [Click into the Chrg Column for Local Pay Buttons]

All Requests Outstanding - By Request Number

RQNO	Patron	Dept	Libr	Chrg	Year	Title	ItemType	ItemF	Sent	Rec	Status	DelM
6550330	Trobaug	HEMON	OHUCHE	$0.00	1999	Leukemia lymph	Journal	Copy	4/10/2002		Outsta	Mail
6550332	Trobaug	HEMON	OHUCHE	$0.00	2000	Cancer genetics	Journal	Copy	4/10/2002		Outsta	Mail
6550334	Trobaug	HEMON	OHUCHE	$0.00	1999	Leukemia lymph	Journal	Copy	4/10/2002		Outsta	Mail
6550335	Trobaug	HEMON	TNUTSJ	$10.00	1999	Leukemia resea	Journal	Copy	4/10/2002		Outsta	Mail
6550446	Aubrech	(None)	TXUDTS	$0.00	1999	J spinal disorder	Journal	Copy	4/10/2002		Outsta	Mail
6569138	Trobaug	HEMON	OHUCHE	$0.00	1999	Leukemia lymph	Journal	Copy	4/11/2002		Outsta	Mail
6569139	Trobaug	HEMON	ILUCMH	$0.00	2000	Biology of blood	Journal	Copy	4/11/2002		Outsta	Mail
0641382	Liang	7370	COUCOL	$8.00	1992	Histopathology o	Monograp	Origin	4/11/2002		Outsta	Mail

This information can be used to cancel and re-direct an item to a lender that includes Copyright payment in the fee, or to add an extra royalty charge to the Patron Charge after the item is checked in.

For **libraries located outside the U.S.** the Requests Outstanding Grid will highlight in red items where the Journal has already been borrowed **10 or more times during the current year**, no matter what the year of publication.

Journal Times Borrowed Count in Requests Outstanding Grid

The number of times borrowed is always available in the Requests Outstanding Grid by selecting **Show All Grid Cols** from the context menu that appears when you left-click the header of any column. Scroll to the far right to view the column (the header will be the current year + "Borr").

All Requests Outstanding - By Request Number

ItemType	ItemF	Sent	Rec	Paid On	Status	DelM	Rus	MaxC	LocalS	SRCE	Note	2002Borr
Journal	Copy	4/10/2002			Outsta	Mail	No	$12.0	Open	DOCLINE		5
Journal	Copy	4/10/2002			Outsta	Mail	No	$12.0	Open	DOCLINE		1
Journal	Copy	4/10/2002			Outsta	Mail	No	$12.0	Open	DOCLINE		5
Journal	Copy	4/10/2002			Outsta	Mail	No	$12.0	Open	DOCLINE		0
Journal	Copy	4/10/2002			Outsta	Mail	No	$12.0	Open	DOCLINE		1
Journal	Copy	4/11/2002			Outsta	Mail	No	$12.0	Open	DOCLINE		5
Journal	Copy	4/11/2002			Outsta	Mail	No	$12.0	Open	DOCLINE		0
Monograp	Origin	4/11/2002			Outsta	Mail	No	$8.00	Open	OCLC		0

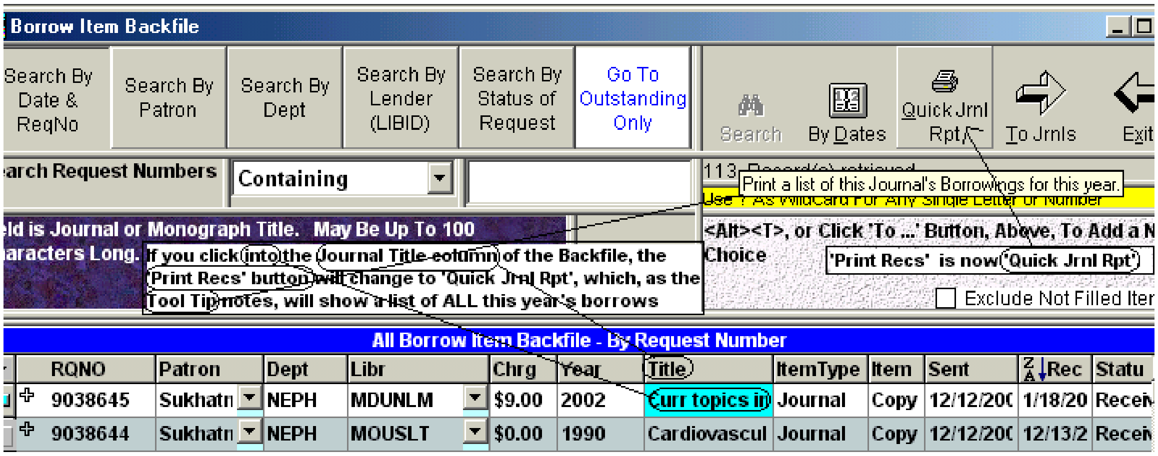
If you click on the header of that column you can Sort Descending to put the most borrowed titles at the top. Again, these numbers reflect **CONTU Guidelines** values in the U.S. (only publication dates within the previous five years) and all dates outside the U.S.

For complete Copyright information, use the Copyright Report (All Items) to check/edit CCL and CCG values; then use the Copyright Report (U.S. – CCC) to file with the Copyright Clearance Center.

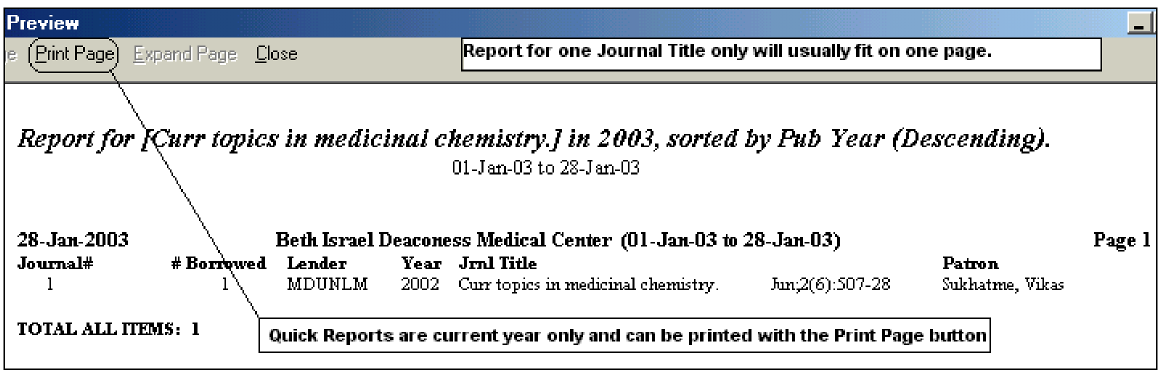
Quick Journal Times Borrowed Report

While the Requests Outstanding Grid will highlight items borrowed 5 or more times, it doesn't show detail on the number of times the title was borrowed. To have a quick look at all Borrow transactions for any title, just click into the Title cell in either the Requests Outstanding or Borrow Items Backfile Grid, which will expose a **Quick Jrnl Rpt button**. Click this button (or press

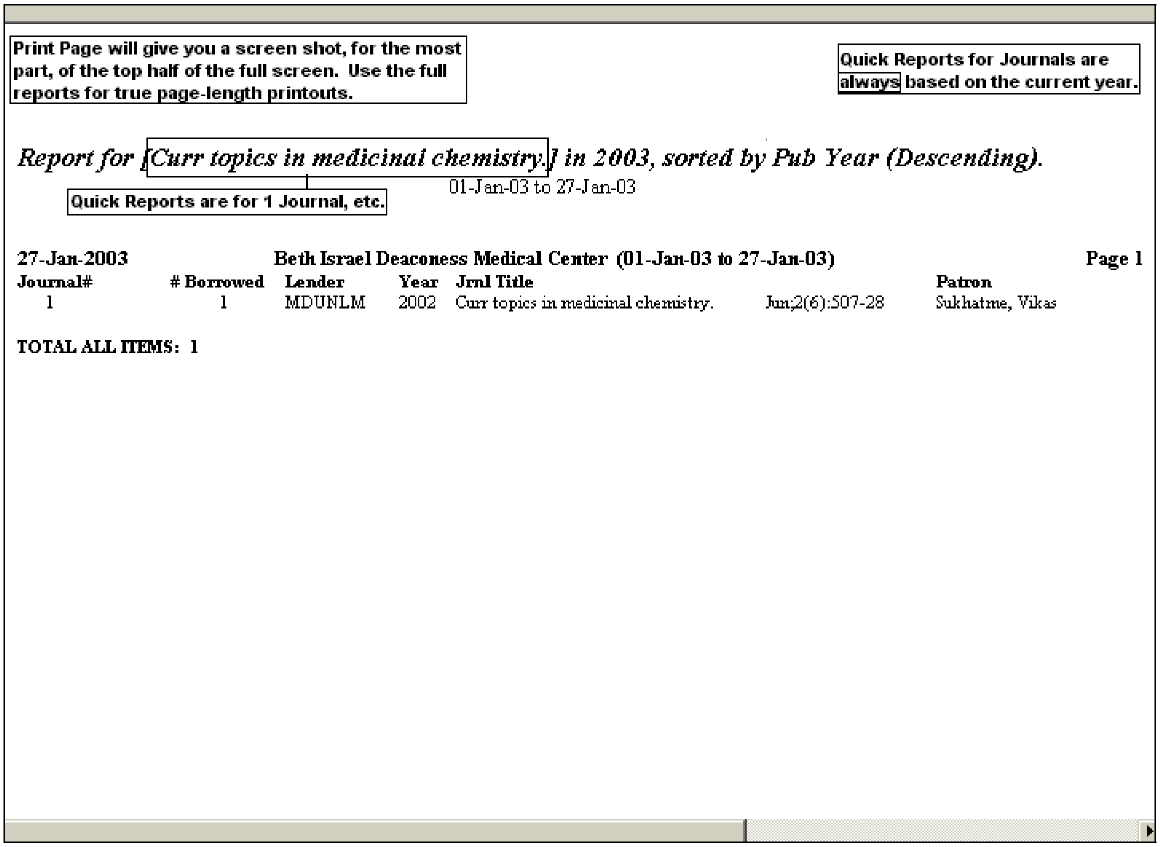
<Alt><Q> on the keyboard) to see a list of all times the Journal Title was borrowed since the beginning of the year.



The Print Preview screen will display the list (the dates Jan 1 to Date are built into this report):



This is basically a short version of the Journals Borrowed (Full) Report. If you want a printout, click the **Print Page menu choice**. The printout is basically a screen shot of the top half of the report.


Print Page will give you a screen shot, for the most part, of the top half of the full screen. Use the full reports for true page-length printouts.

Quick Reports for Journals are always based on the current year.

Report for [Curr topics in medicinal chemistry.] in 2003, sorted by Pub Year (Descending).

Quick Reports are for 1 Journal, etc.

01-Jan-03 to 27-Jan-03

27-Jan-2003 **Beth Israel Deaconess Medical Center (01-Jan-03 to 27-Jan-03)** **Page 1**

Journal#	# Borrowed	Lender	Year	Jrnl Title		Patron
1	1	MDUNLM	2002	Curr topics in medicinal chemistry.	Jun;2(6):507-28	Sukhatme, Vikas

TOTAL ALL ITEMS: 1

Because of the way this is set up, it will only print as much of the report as shows on top of the horizontal scroll bar at the bottom, but this should be sufficient for most shorter lists.

Checking In Requests Outstanding

There are a number of ways to check in an Outstanding item that has been received:

1. <u>Change Status to Received</u>. An item can be checked in, once it's arrived, by simply changing its Status to **Received** from **Outstanding** in the **Status column**. If you enter nothing in the Rec'd date column (just to the left of Status), Today's Date will be applied (you can always enter the date information also, of course). Then, either click on another row of the Grid or click **Save Changes** to register the change.

2. <u>Enter a Received Date</u>. Entering a Received Date in the **Rec'd column** will automatically change the Status to Received. Then, either click on another row of the Grid or click **Save Changes** to register the change.

3. <u>Use the Record Selector button</u>. You can also **batch check-in** ALL of Today's Check-ins by first selecting each one (use the Record Selector button at the left edge of each row; Record Selectors are described below). Holding down the Ctrl Key while clicking each Record Selector allows the choosing of multiple rows. Holding down the Shift Key while clicking the Record Selectors of two records will choose those two plus any records in between. See 'Selecting Grid Records' below for illustrations.

Once you've selected the records to check in, you can change the Date to be applied as the Rec'd Date to all of them by clicking the Default Date button (all these buttons will appear when the first record is selected), but in most cases the initial default, Today's Date, will be appropriate. At that point click the new **Mark Rec'd button** to check in all selected items. Only items still marked as Outstanding or **Queue** (which is the status of any **Loansome Doc** request when it's first received) will be affected.

While this method is most useful as a batch check in, it can also be used regularly to check in individual items. The procedure is as follows:

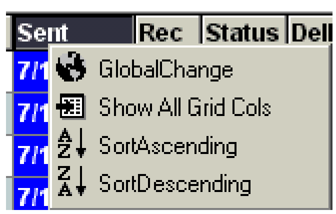
1. Click the Record Selector next to the item you want to check in;
2. Change the Default Date if necessary;
3. Click the Mark Rec'd Button to record the change;
4. Repeat for any other individual check-in.

4. <u>Use a bar code reader</u>. Ron Schultz posted this to QuickDOC-L of his experience using his **bar code reader** to check in items as they arrived:

> This is what I have found using the new borrowers section of q-doc. I use bar-codes. I also save in a file a copy of the request to include the bar-code for the record number. I scan the bar-code and the record comes up in the "outstanding" section.
>
> I first check to make sure it is from the original library, if not then the change is made.
>
> Second, I change the outstanding to received. Today's date will also be filled in. I then update.
>
> After a few days of working with the system, it can all be done in about 5 seconds now. I am then off to the next record. The bar-code reader speeds this up nicely.

The Patron and Libr columns include dropdown boxes with lists of ALL Patrons in your Patrons Table (**tblPatrons**) and ALL Libraries in your Libs Table (**tblLibs**). These lists are opened by clicking the down button (for some reason it takes three clicks the first time to drop the list down, but only one thereafter) at the right edge of each column. Fields with data that may be wider than the width of the column they reside in will show the complete field information as a Tool Tip when you move the Mouse Pointer over that cell (as in "Jones, Joe" above).

In the case shown above, the Requests Outstanding Grid shows a typical screen after an initial import in a library that has been saving requests in QDPortal but has just begun using QuickDOC. In most normal use, you will not have 2,756 Outstanding Requests! (If you do, hire help at once.) In normal use, after doing the import from QDPortal for that particular day, come here to the Requests Outstanding Grid and check to be sure that all requests sent have been properly imported into the database. You can reverse the normal sorting by clicking the header of the "Sent" column to get the **Column Context Menu**.

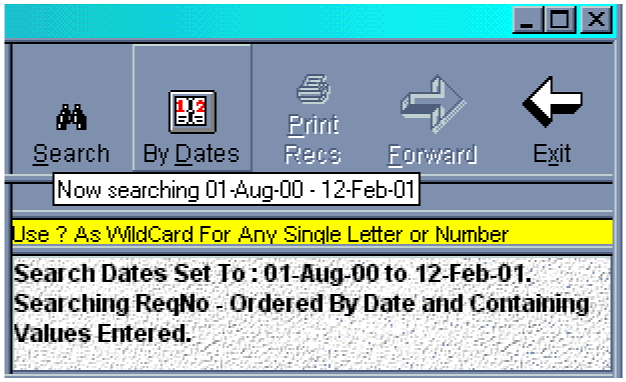


and choosing "Sort Descending." This will put today's items right at the top for easy checking.

You can toggle back and forth between these two Grids using the Ribbon Button with the white background and blue letters. In the above Grid, clicking the "**Go to ALL Borrow Items**" button will switch to the Borrow Item Backfile Grid.

Borrow Backfile Grid

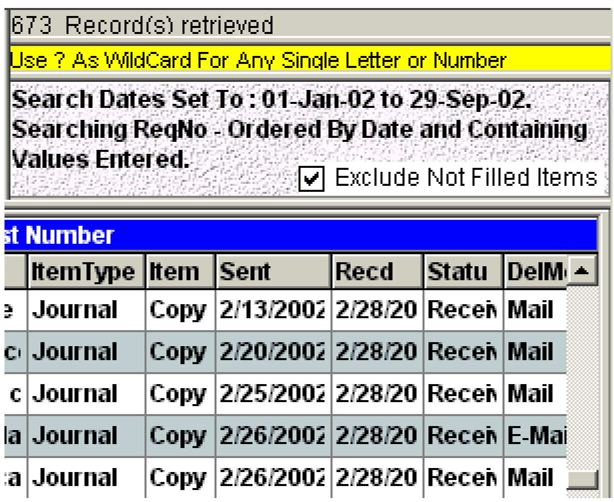
All items that have been completed, whether received or just unsuccessful, will appear in the Borrow Backfile Grid. Initially, the **Date Range for searches** will be either "Six Months Ago to Today," or the "Beginning of the Year to Today," whichever is greater. **Current search dates** are often shown in the gray box just over the top right of the Grid. Current search dates are also available as a Tool Tip when you let the Mouse Pointer hover over the **By Dates Button** for a second or two:



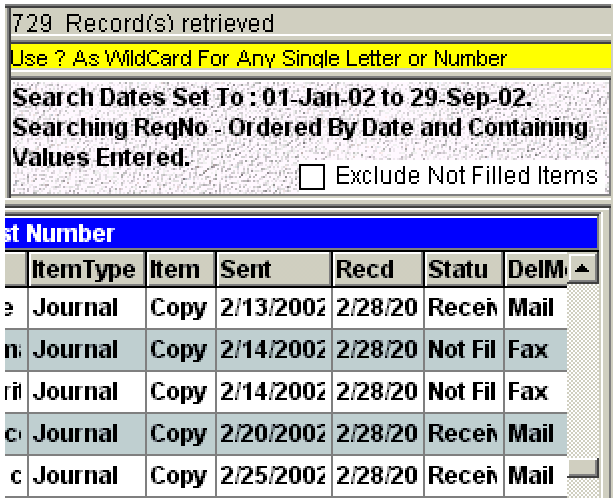
Excluding Not Filled Items from Items Retrieved

In the Borrow Item Backfile Grid, **Not Filled Items** are usually **included** in the records retrieved, except when a **Search By Status of Request** search specifically indicates that a certain status only is expected (e.g., a search for **Status Equals Received** will not, by definition, include Not Filled Items).

You can specifically exclude Not Filled Items from the records retrieved by checking the **Exclude Not Filled Items checkbox**.

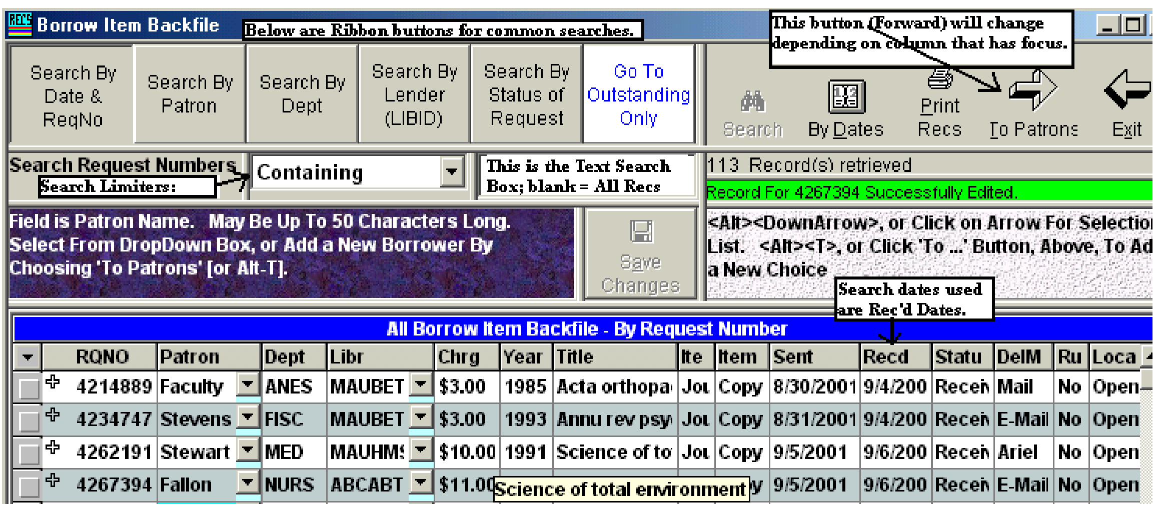


The same search, run with the checkbox unchecked, will include Not Filled requests along with others retrieved using the criteria specified.



Since the Requests Outstanding Grid, by definition, won't include items with a Status of Not Filled, the Exclude Not Filled Items checkbox only appears in the Borrow Item Backfile Grid.

As with all Grids, the Ribbon Buttons just above the Search Text Box are used to stipulate a common search type: Request Number, Patron, Dept, Library and Status.

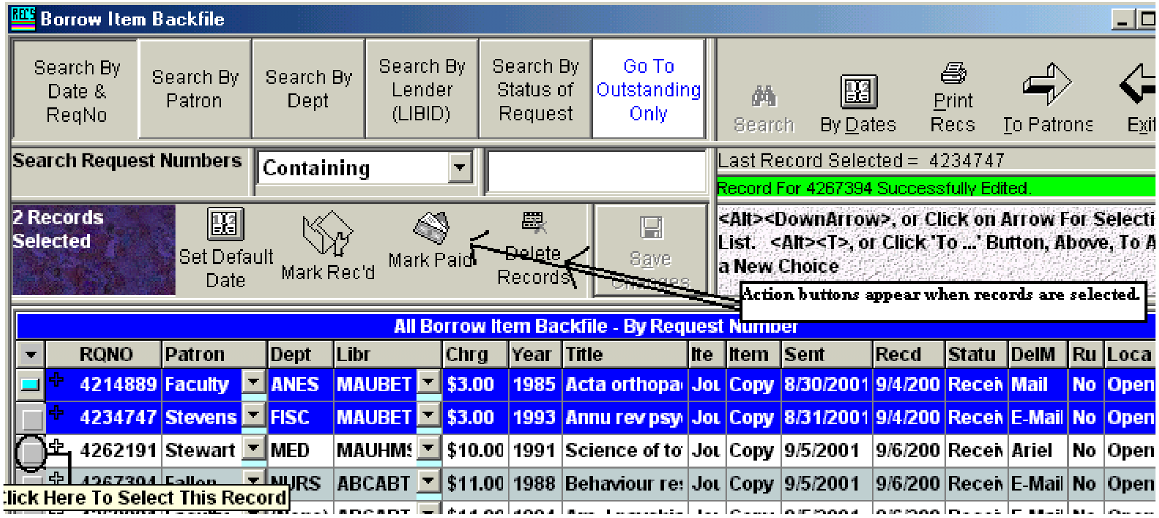


The total number of **records retrieved by a search** is displayed in the space just beneath the By Dates Button.

The **Name of the Grid being used** is always at the top left of the form (Borrow Item Backfile, above). A **Description of the Grid's Search Results** appears in the middle of the blue Grid Header ("All Borrow Item Backfile – By Request Number" in the case, above). Clicking any of the column headers exposes a **column context menu** for that column, with choices for Show All Grid Columns, Global Change, and Sorting A-Z or Z-A (see above).

Selecting Grid records

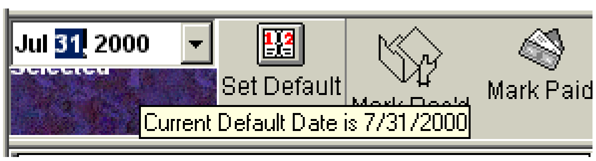
You can select and delete a batch of Grid records by using the **Record Selector button** at the left of each row to select the row (or rows). Selected rows are highlighted in blue, as shown in the illustration below:



In the view above, **highlight rows you want to process by clicking their Record Selectors** (the buttons on the left column). To **select more than one record**, hold down the Ctrl key while clicking, or press the shift key to **select a range of records** from the first record selected to the end of the group you want to delete. To select ALL Records in the Current Grid, you can simply click the topmost button over the Record Selector column (it has a small, inverted pyramid as an icon), and you will notice that all rows in the Grid turn blue.

Setting the Default Date for Batch Processing

Unless you want the **Default Process Date** to be Today's Date (the default), select the Date you want applied to all items in the batch by clicking the 'Set Default Date' button. Use the Date Box or the Calendar to choose the Default Process Date. This is the date that will be applied to all items selected when each is Marked Filled or Marked Paid, appropriate.



Once you've selected the Default Process Date, make sure it's registered by either pressing Enter (if you've been entering it by typing in the date box) or by clicking the "Set Default Date" button again. The current Default Date is always available as a Tool Tip if you place the mouse pointer over the button, as above. Once the Date is satisfactory, click the 'Mark Rec'd' or 'Mark Paid' button, and all records selected will be processed, one-by-one so that any database relationships can also be updated.

Marking Rec'd Borrow Grid records

This is the common process of checking in items as they are received. In addition to changing the Status column directly (discussed above), you can use Record Selectors to batch this process as well. Use the Record Selectors to select all the items you want to Mark Rec'd (check in).

Once you've selected the records, you can change the Date to be applied as the Rec'd Date to all of them by clicking the Default Date button, but in most cases the initial default, Today's Date, will be appropriate. Once the records to be checked in are selected, and the date of check-in is correct, click the **Mark Rec'd button** to check in all selected items. Only items still marked as Outstanding or **Queue** (which is the status of any **Loansome Doc** request when it's first received) will be affected.

While this method is most useful as a batch check in, it can also be used regularly to check in individual items. The steps are as follows:

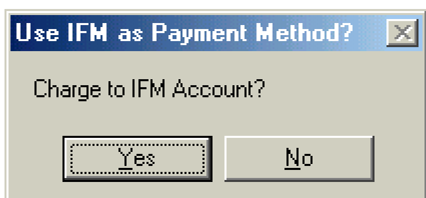
1. Click the Record Selector next to the item you want to check in;
2. Change the Default Date if necessary;
3. Click the Mark Rec'd Button to record the change;
4. Repeat for any other individual check-in.

Marking Paid Borrow Grid records

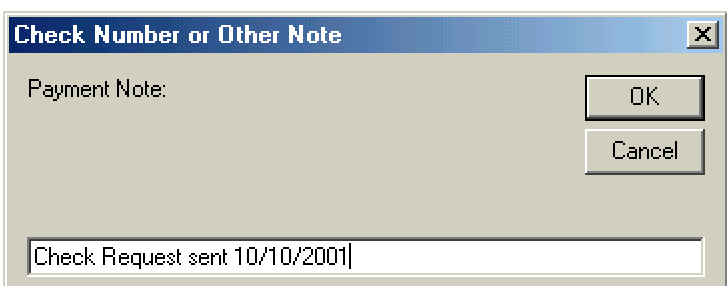
This is the method used for recording **Payments to a Lending Library**. The most obvious use is for batch processing a payment of a **Lending Library** , an **EFTS Monthly Statement** or **IFM Statement** of activity. Use the Borrow Item Backfile Grid and set the Start and End Dates to a period a week or two wider than the dates represented on the Invoice or Statement (because the Invoice will reflect the Lending Library's Fill Date, while our date of activity is the Received Date). For an Invoice, you can further restrict the display to the Lending Library. For an EFTS or IFM Statement, restrict the display by clicking the **Search By Status of Request** ribbon button and choosing **Equals Received** to eliminate the Not Filled items, etc. The list will then be arranged by Date Received and will contain only items that haven't yet been paid. Working from the Invoice or Statement, you can select each item listed thereon by holding down the Ctrl Key and clicking the appropriate Record Selector.

Once you've selected the records to mark to paid, with the proper date of payment set in Default Update Date (which, for an Invoice, might be the date a Check Request was created and sent to Accounts Payable), you can mark all selected records to Paid by clicking the **Mark Paid Button**.

If your own Library record indicates that you participate in the EFTS or IFM systems, you will be asked whether this payment is an EFTS or IFM payment:



Whether or not this is an EFTS or IFM payment, you will next see a box entitled **Check Number or Other Note** for recording Payment Information.



Use this to file away pertinent payment notes, etc. When you click 'OK' above, the records will be changed to **PaidLender** in the Status column (**PaidEFTS** for EFTS Payments, and **PaidIFM** for IFM Payments) and the payment will be recorded in the Borrow Payments Table (tblBorrowPayments) by Request Number and with the appropriate note. **Borrow Payment Type** is either EFTS, IFM or Other for all Borrow Payments at this juncture.

Steps for recording payments to Lending Libraries are as follows:

1. Click the Record Selector next to the item you want to mark Paid;

2. Repeat as necessary (with Ctrl key pressed) for all items in the Invoice, IFM or EFTS Statement,
3. Change the Default Date if necessary;
4. Click the Mark Paid Button to begin the update;
5. Enter any Check or Payment info in the Payment Note box
6. Repeat for other invoices.

While batch processing is the most obvious use of this method, it can be used as an alternative to individual editing of the Status column as well. In fact, using the Record Selector method, even for an individual paid request, provides more information on the payment than just changing the Status to Paid.

Only items marked as Received can be changed to Paid. If you have an item marked Outstanding or Queue or Paid, you must first check it in as Received before proceeding.

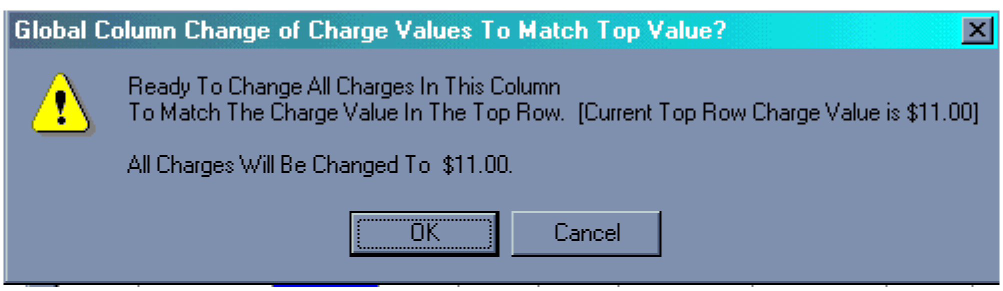
Deleting Borrow Grid records

Once you've selected records to delete, you can delete that batch with the **Delete Records button**. Records marked **'PaidLender', 'PaidIFM'** or **'PaidEFTS'** will not be deleted in this batch process. They must first be marked back to '**Received**' so that any related Invoice or Payment table information can be properly updated as well.

Global Updates of Borrow Grid Columns

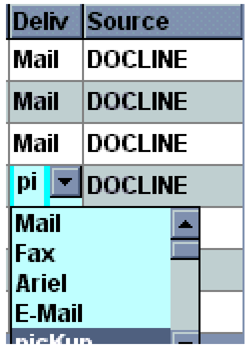
Perform **Global updates** by first editing the topmost record of a column where you want all the records to have the same value. Once the top record has the correct value, perform the Global change by left-clicking the button at the top of the column, such as "**Chrg**" above.

The column will be highlighted and a message box will give you a chance to back out, if necessary.



If you click OK, all the values will change to $11.00, except for columns where processing has moved to a state where a change in charge isn't appropriate, such as Status of PaidLender, or Not Filled. Similar restrictions apply to most Global Column Changes.

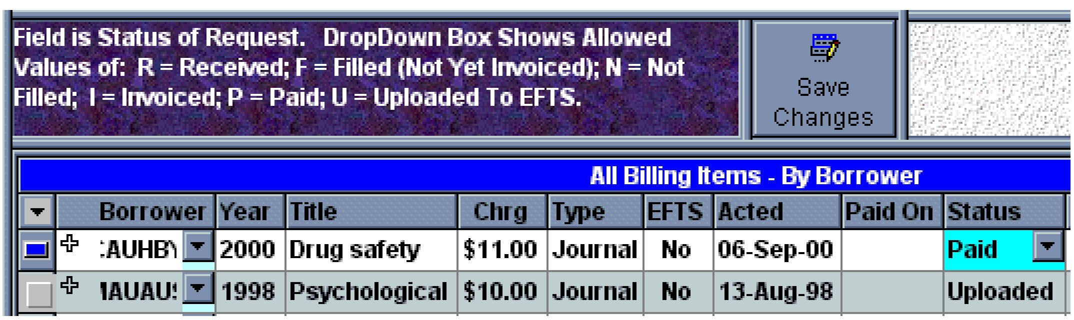
Most of the columns have Dropdown boxes, or Calendar controls, for choosing options. The Delivery Method column can be changed by clicking on the Down Arrow and choosing from the list:



If you start typing the beginning letters of the value (as in picKup, above), the selection should be found as a matter of course. You can also **open a dropdown box on any Grid** either by clicking the down arrow or by pressing `<Alt><Down Arrow>` in the field.

Save Changes Button

In any case where changes are made to values on any Grid, the changes are written to the database whenever the focus is moved from the row that is being edited to another row on the Grid. Just clicking on another row, or using the down arrow or up arrow keys will cause the change to be filed. Once editing has begun, the **Save Changes button** will appear when there are changes ready to be filed. This button is really just an alternative method of registering changes, since any movement out of the row will do the same thing. The Save Changes button is essential, though, when a Grid has but one row.



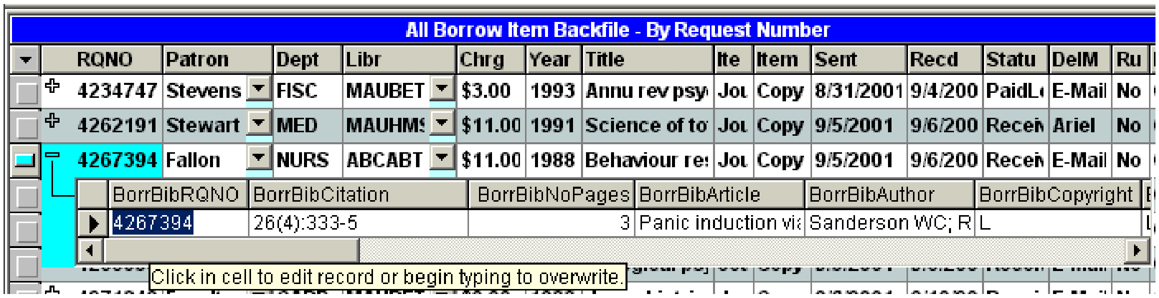
Clicking this button files any changes without the necessity of leaving the row.

Displaying and editing Borrow Citation records

The **citation information underlying the records displayed on any G**rid can be displayed by clicking on the + sign to the left of the record. This information is kept in the **tblBorrBibs** Table of QuickDOC.MDB and contains the following fields:

BorrBibRQNO	- Request Number, associates this record with tblBorrowItems
BorrBibCitation	- Citation information
BorrBibNoPages	- Number of pages in citation, used for Copyright reports, etc.
BorrBibArticle	- Title of the article borrowed
BorrBibAuthor	- Author of the article borrowed
BorrBibCopyright	- L or G, from the original request
BorrBib RefReason	- Referral Reason as indicated on Request
BorrBibPMUI	- PubMed ID, if applicable, will be used to flag dups

BorrBibPurpose - Purpose of Request, for tracking type of activity



The highlighted cell is shown as above and any of the information displayed (except for the first cell, which contains the Request Number) can be edited in the usual fashion, by either clicking at an insertion point or typing over the currently selected value.

The insert seems to display best, by the way, when the record to be opened is toward the top of the Grid, where it displays underneath the current record, rather than at the bottom, where the display will move the current record to the top, and then display the child record underneath it. The effect of this movement can be confusing at first in the latter instance.

Displaying and editing Borrow Local records

Local Billing, Due Dates, Returned Dates for returnable items, and other information can be displayed by clicking on the + sign to the left of the record. Since this will toggle between the Citation Records (tblBorrBibs) and the Local Billing view (tblBorrLocals), you may have to click a few times before the proper view comes up.

In order to make this process a bit more accessible, if you press the **F4 Key** before clicking the **+** sign, the default will be for Local Information rather than the Bibliographic in both the Requests Outstanding and BorrowItem Backfile Grids. This option only occurs if the focus is in the **RQNO cell**.

This information is kept in the **tblBorrLocals** Table of QuickDOC.MDB and contains the following columns:

RQNO - Request Number

ChgAsPatron - Charge if a Patron Invoice is issued

Dept - Department

ChgAsDept - Charge if a Dept Invoice is issued

CostCtr - Cost Center assigned for this item

Item - Year and Title

LocalDel - Internal Delivery Method

Rush - Is there a Rush on this internally?

LocalStat - Internal Payment Status, also on Backfile grid

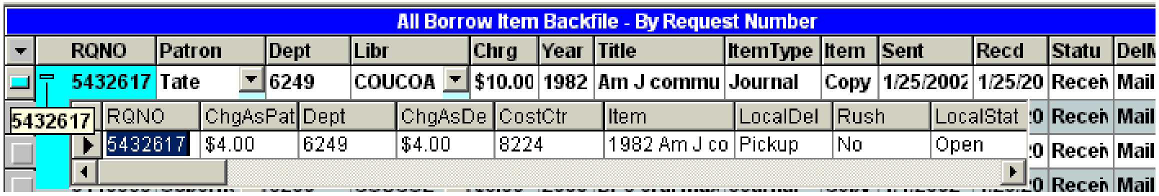
Rec'd - Date Item received

Paid - Date Local Payment was received from Dept or Patron

Due Back - Date Item is due back to Lender (returnable items only)

Date Ret'd - Date Item was sent back to Lender (returnable items only)

Local Invoice - Invoice number for Patron or Dept



There are also two columns in this view that are not displayed, although they can be uncovered by moving the vertical bar between RQNO and ChgAsPatron (for BorrLocalPat) or that between Rush and Local Stat (for BorrLocalCHRG) to the right:

BorrLocalPat	- Patron Number (not displayed)
BorrLocalCHRG	- Holds the final charge (not displayed)

The highlighted cell is shown as above and any of the information displayed (except for the first cell, which contains the Request Number) can be edited in the usual fashion, by either clicking at an insertion point or typing over the currently selected value. Some columns, such as the Delivery Method column, have dropdown lists to be used for changing values.

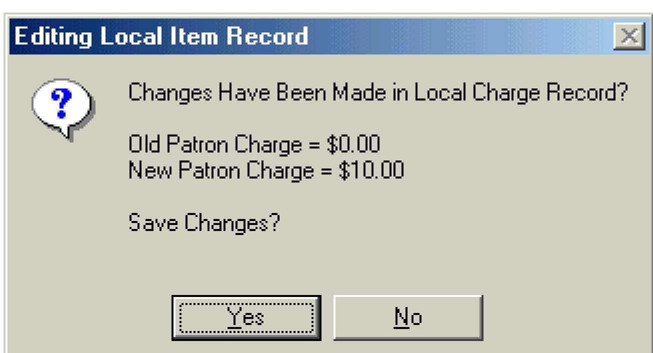
Local Charges – How and when are they computed?

The charges in the Patron and Dept columns are computed when the item is checked in (Status changed to **Received**, using any of the check-in methods), and are based on the **Local Charge Profiles** assigned to the Patron and Department. If you want to assign a different **Patron Charge** or **Department Charge**, wait until **AFTER check-in is complete** and assign changes only to Received items. Otherwise any changes you make may be overridden by the automatic calculation.

The final charge (which will appear in the undisplayed **BorrLocalCHRG** column) isn't figured until the decision is made to generate an invoice, or to mark an item internally as Paid. When the invoice is generated, either the ChgAsPatron or ChgAsDept value is used, depending upon whether a **Patron Invoice** or **Department Invoice** is printed.

When an item is marked as Paid (with no Invoice having been generated), the charge assigned is determined by which of the **Local Status Choices** is used: **PaidPt** (i.e., **Paid As Patron**) uses ChgAsPatron and **PaidDp** (**Paid As Dept**) uses ChgAsDept.

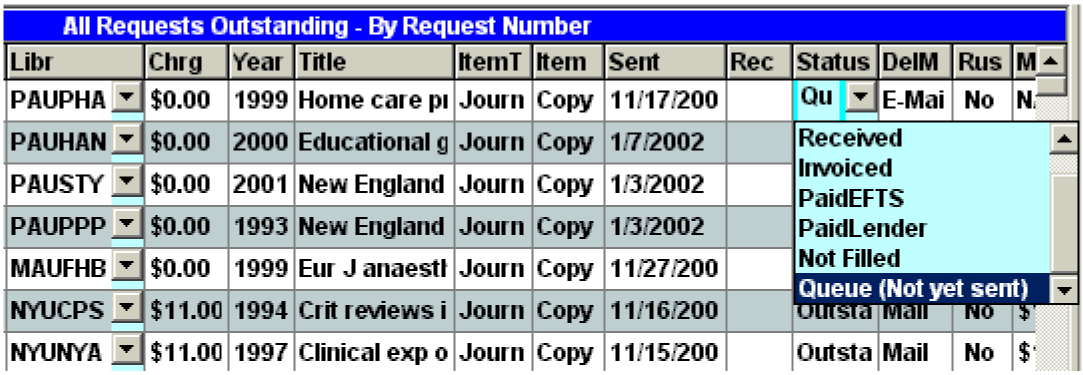
If you edit any of these BorrLocal fields, the new entry will appear in blue and you will be asked if you want to save the change when you click the minus sign to close this view.



Loansome Doc Requests

For the most part, Loansome Doc requests are treated as a typical **Borrow Request**. **Loansome Doc Patrons**, even if they are out in the hinterlands and unaffiliated with your institution, come into the system at your behest and are considered your patrons on DOCLINE. Treating Loansome Docs as Patrons also allows for Local Billing to track and bill Patrons no matter which method they used to get the request information in to the library.

When Loansome Doc requests are first downloaded from DOCLINE they appear in the Requests Outstanding Grid with the **Status of Queue (Not yet sent)**. This is the natural state for a Loansome Doc when it is first received, since we're not sure whether it will be filled from the local collection or transferred onto DOCLINE. Though there is a Sent Date indicated, it is for the moment really an **In Queue Date**, since it hasn't been sent anywhere yet.



If this item can **be filled from the local collection**, it will skip the Outstanding status entirely and go directly to Received (think of it as if it were a complete DOCLINE transaction, and you've now got the item in hand, from your copier instead of the Mail Room, ready to give to the Patron).

When you mark a **Loansome Doc as filled on DOCLINE**, the update is saved in QDPortal (the filename is **LDXUpdt.txt**) and updated to the database, checking it in as **Received**, with today's date, with your LIBID as the Lender. If the update doesn't occur automatically, make the change manually on the Requests Outstanding Grid. In this way all your Loansome Docs, both those you filled and those filled via DOCLINE, will be available for Billing and statistics in the same format.

If the request can't be filled from the local collection**, transfer it onto DOCLINE** in the usual manner.

The status should change when this activity is picked up through the Portal (the filename is **LDXTrfer.txt**), with new status value of Outstanding and the new Lender's LIBID replacing yours. If the update doesn't occur automatically, make the change manually on the Requests Outstanding Grid.

The **Source** column is on the far right of the Grid (you'll have to scroll to the right to see it). It indicates DOCLINE for regular DOCLINE requests and **LOANSOME DOC** for items input via LD (even if it later gets transferred onto DOCLINE, since this is how we track Loansome Doc activity). You can group together these Source groups on any Grid by clicking the Header of that Source column and choosing Sort Ascending (puts DOCLINEs at the top together) or Sort Descending (put LOANSOME DOCS at the top, together, after Source 'Other' if you have any).

Searching Borrow Grid Records

My boss is asking me how many loans have we gotten at no charge versus the amount we've paid for. Is there any way I can get this for either what we've borrowed or what we have loaned using QD?

The **Compute Totals** Report will give you average cost per Loan/Borrow but not absolute numbers for **Free** and **Not Free**. But we can get these numbers fairly easily from the Borrow Grid.

1. Open up the Borrow Item Backfile and search by the relevant Dates

2. Click **Search**; this will get you all records during that period.

3. Click the Header at the top of the **Chrg** column and choose **Sort Ascending**. This will put all the Free items at the top.

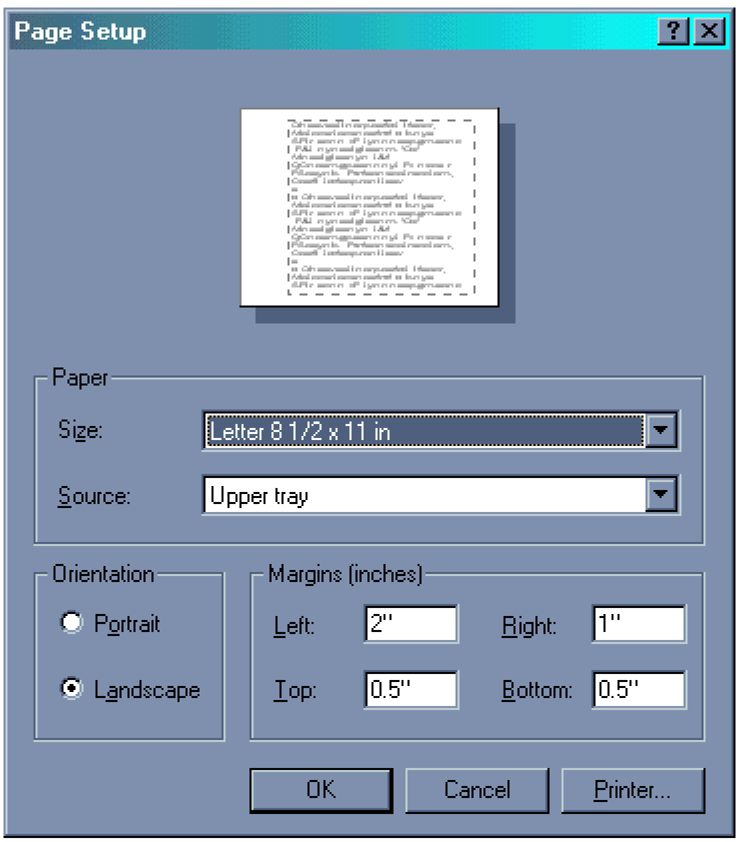
Click the **Record Selector** next to the first 0.00 row (it turns the row blue), scroll down to the last 0.00 row and, holding down the Shift key, click the Record Selector next to that row. They all turn blue and the "nnn Records Selected" gives you your answer at the top.

But this group also includes Not Filleds. If you want to eliminate those, click the 'Search By Status' ribbon button and choose Status Equals Not Filled. That will get you a list of Not Filleds for that period. Click the header over Chrg for that group and Sort Ascending. That will put the 0.00 Not Filleds at the top. Use the Record Selectors to highlight the 0.00 Not Filleds and you'll have the number to subtract from the 0.00 records selected in the paragraph above.

Print Borrow Grid Records

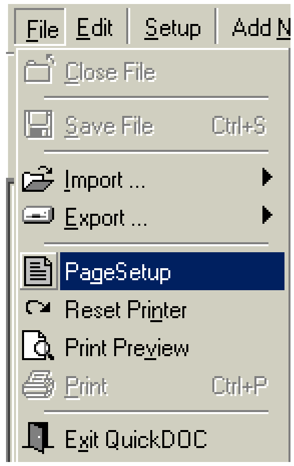
The **Print Recs button** provides a quick way to get a printout of a Grid. The first time you choose to print you'll be brought to the **Page Setup screen**, to choose your typical print parameters (**Margins**, **Orientation**, etc.).

Page Setup for Printing Borrow Grid Items

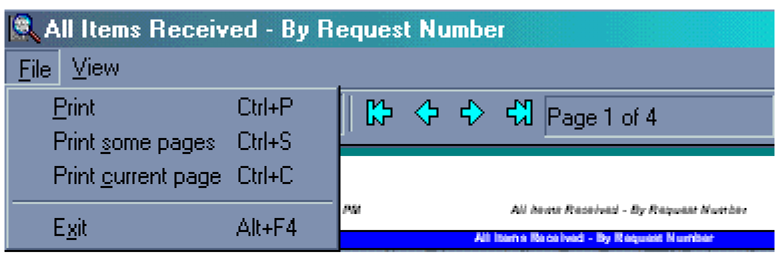


These are saved as defaults (in a file called **PageSet.dat**) and used for subsequent print jobs. If no settings are chosen, then the Page Setup form keeps coming up, so it's a good idea to pick a default setting. Also, when you change printers, or if you encounter a **Printer Not Found** error when trying to print from the Grid, you can force a new Page Setup by choosing **Reset Printer** from the File Menu. This will clear out the current PageSet.dat file so that all new values can be written for the new printer. You'll need to exit QuickDOC and re-enter for the **Printer Reset** to take effect.

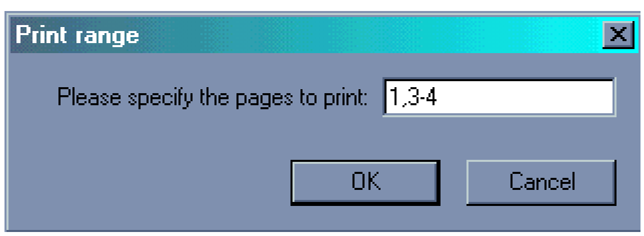
Because the Print Setup is used mostly in the Grid Print process, the print-related choices on the File Menu are often not enabled if a Grid is not being displayed. If the choice you want isn't enabled, just open any Grid and populate it with some records. That should give you the following version of the File Menu (under File on the Menu Bar):



If the number of Grid records equals a print job of two pages or less, it will be sent directly to the printer. There are approximately 30 lines on each page for **Landscape** and 37 for **Portrait**, so that reports of fewer than 61 or 75 records, respectively, will be printed directly. If the report is longer than that, you'll first get a message box asking whether you want a **Print Preview** first, where you can choose the specific pages to print.

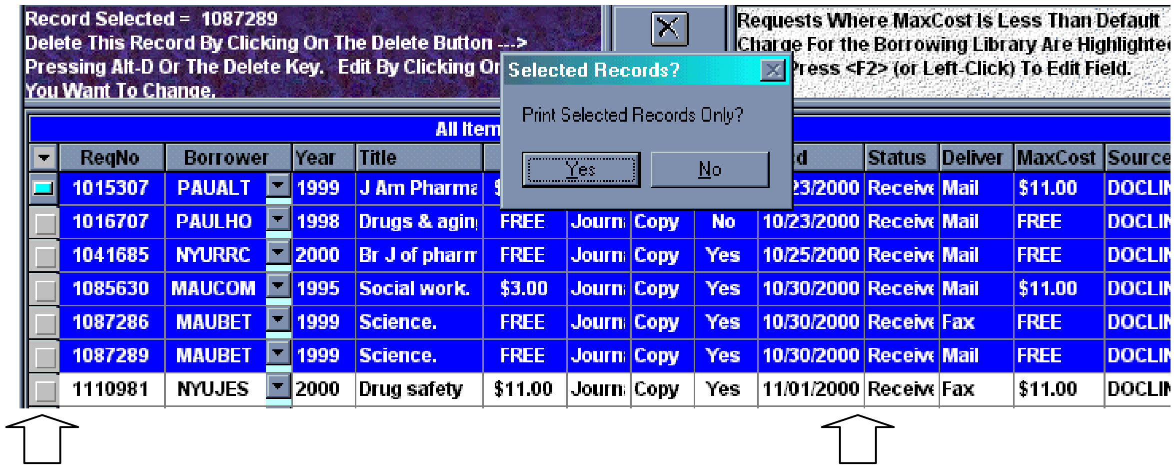


Under **Print some pages**, you can choose the specific pages to print.



In the example above, we've chosen to print the **first page, plus pages three and four**.

You can also choose to **print just Selected Records**. First, select the records you want to print by clicking on the Record Selector button (the leftmost column on the Grid). **Hold down the Ctrl key while selecting to add multiple records, or hold down the Shift key after selecting the first record and click the Record Selector of the last record in the group to select all records in between.**

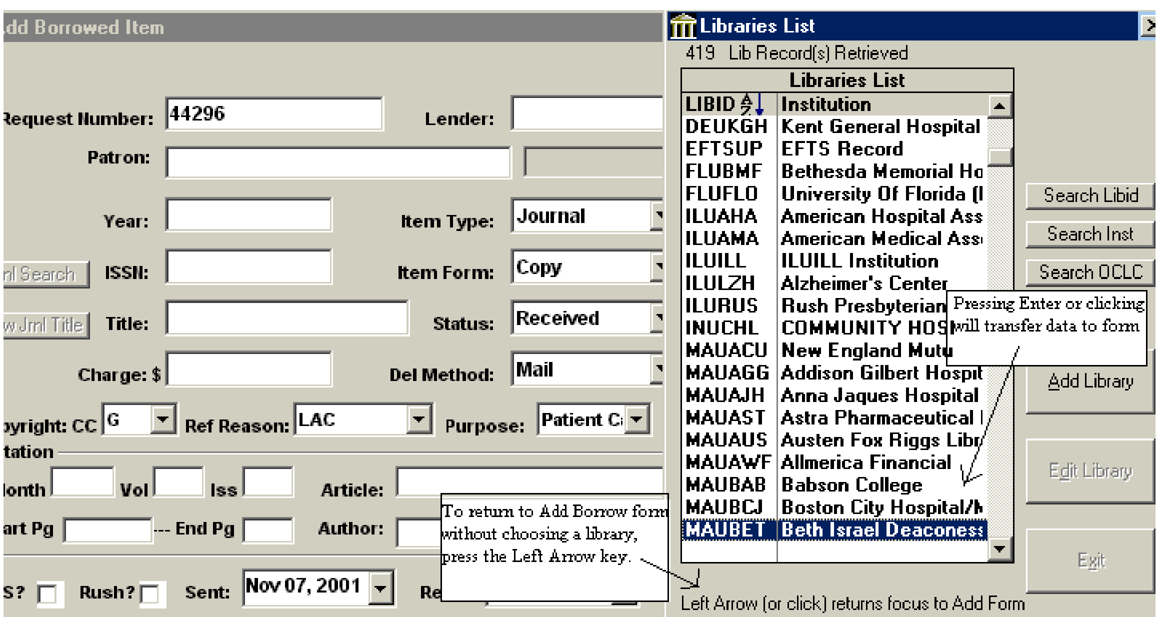


[**This is the** **Record Selector column**.] [**All** **dark blue rows are selected**.]

Add Borrow Item Form

Selected with the Toolbar **Add Borrow button**, or from the Menu Bar under Add New, and Borrow, this form adds a record to the Borrow Item backfile. It can be a **Non-DOCLINE item** or an **item not successfully captured through QDPortal**. The Add Borrow Item Form also includes access to the **Libraries List**, for selecting the Borrowing Library, the **Patrons List**, for selecting a Patron, as well as a **Journal Titles List** (which is searchable by Title, ISSN or NLM UI), which can also be used for incremental data entry. You can also use the **Down Arrow key** to locate the Library (or Patron or Journal Title) and the **Enter key** to choose the highlighted selection and transfer the information to the Add Borrow Items form.

If you begin typing the Library's LIBID when the Libraries List pops up, the selection will begin travelling down the list until it reaches the LIBID in question (assuming it's already in there).



Clicking on that list item (or pressing **Enter** when the item is highlighted) effectively registers your choice. Once you choose the Library from the list, **the Library's values for LIBID, Charge (for the Delivery Method indicated) and EFTS are filled in at the same time**. If you don't want to use the Lookup List, you can **enter the LIBID directly** (assuming you know what it is) by exiting the Libraries List without making a choice:

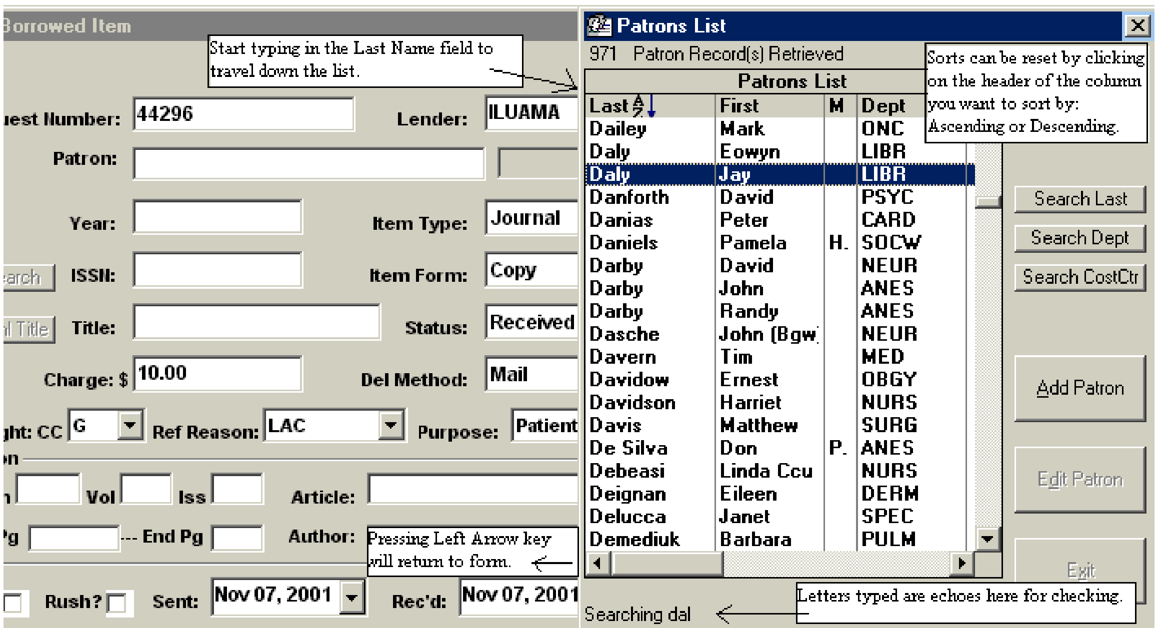
1. Double-click in the LIBID box (or press the Left Arrow Key) to return focus from the Libraries List to the Borrower box on the Add Borrow Item form.
2. Type in the LIBID.

Check the libraries box to the right and it should match if your typed-in value is in the database.

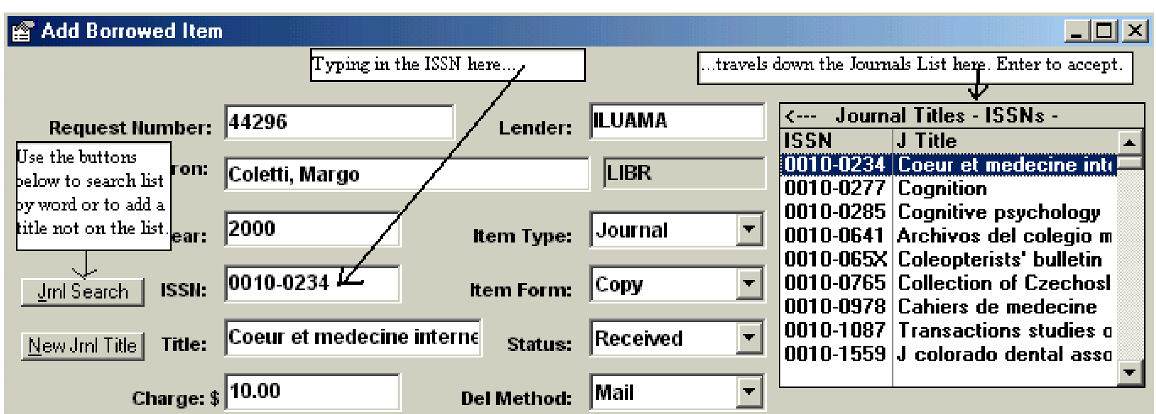
Default values are also the settings for each of the Combo Boxes, although any others can also be chosen from the dropdown list.

Enter the Patron from the Patrons List in similar fashion. You can also search the Last Name, Department and Cost Center fields to narrow down the choice.

In order to track Patron activity, you should create a Patron Record if the name you want isn't already on the list. Use the **Add Patron button** to get to the **Patron Information Form**.



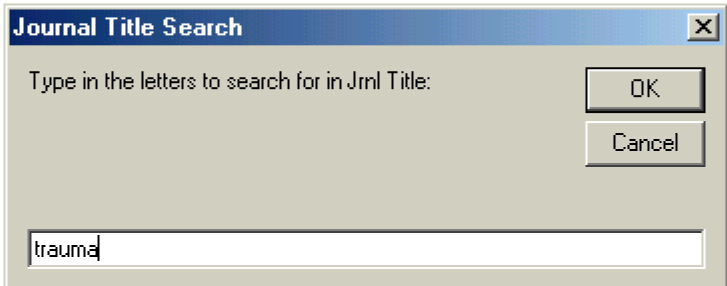
The program keeps a table of **Journal Titles**, **ISSNs** and **NLM UIs**, sorted alphabetically by either ISSN or Journal Title, which can be used for authenticated data entry. Choosing an item from the list will fill in both the Title and ISSN text boxes.



The first match after three digits will move those values over to the Add Borrow Item form. But keep entering the ISSN until it travels down the Journal Titles – ISSN List to the correct Journal Title. At that point press Enter or click on the entry to move the values for ISSN and Journal Title over to the Add Borrow Form.

If you don't know the ISSN, leave it blank and press Enter twice to use the Title box in much the same way as the ISSN box: For an **incremental Journal Title Search** begin typing the Journal Title, using the common QuickDOC abbreviations (see below) and the list will be populated after the third character. Continue typing until you reach the desired title (it would require Br J ha to get to Br j haematology, for example).

You can also use the **Journal Search button in the Add Borrow Form** to search on title words:



would return all titles with "trauma" in the Journal Title.

Use the **New Journal Title button** to move to the **Add/Edit Journals Form** to add a title.

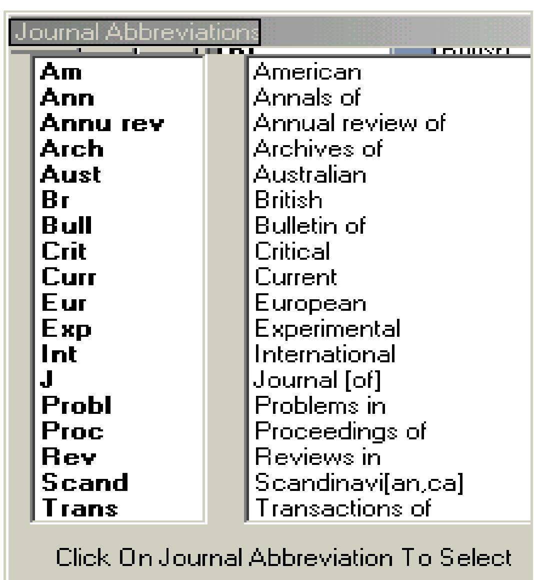
Once the Journal ISSN and Title have moved over, a new **Edit Journal Button** appears, which can be used to move directly to the Add/Edit Journals Form.

If the Journal Title is not on the list, you can add the Title and ISSN so that it's included in future lists, or you can just add the title for this request only (without the ISSN). Since we don't keep track of ISBNs, this will always be the case for monographs.

When entering titles directly, either here or in the Edit/Add Journal Title form, try to use the list of Journal Abbreviations that appears just off the right side of the form, so that future sorting and displaying of Journal information can be consistent. You can enter a Journal abbreviation by clicking on it, or simply by typing it in on the form.

Journal Abbreviations used in QuickDOC are few and fairly standard.

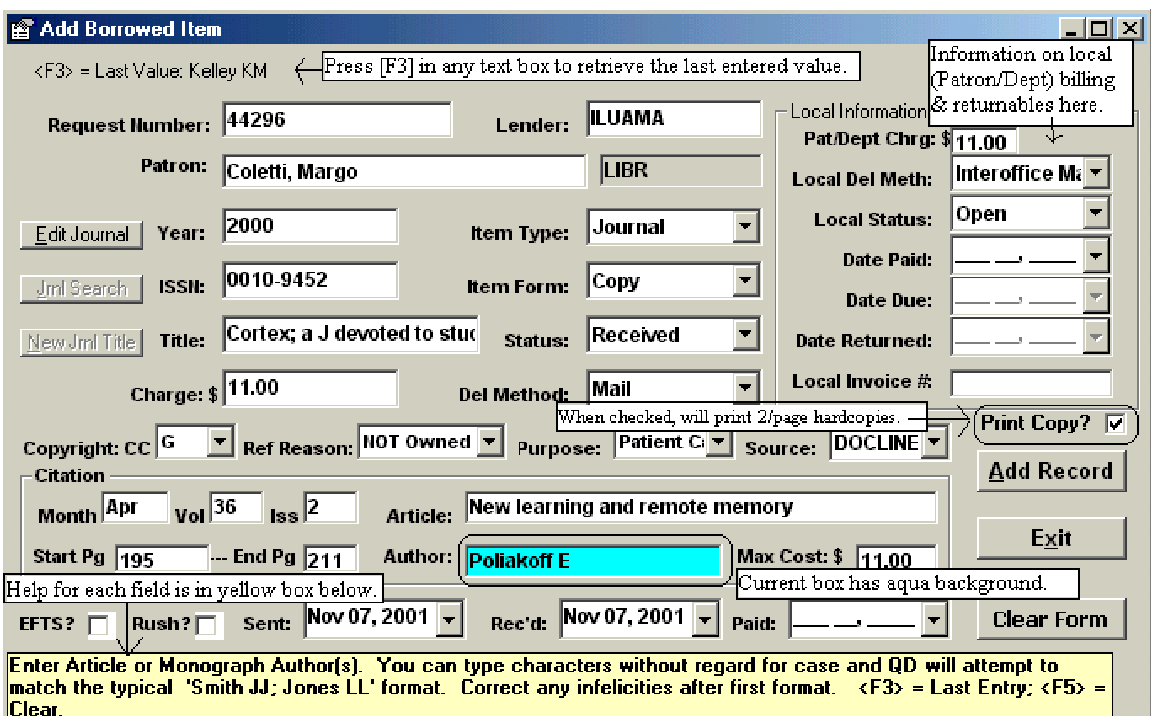
Journal Abbreviations



An attempt will be made to automatically format data entered for **Citation information**, etc., so that keyboard data entry can be as efficient as possible. In general, the following rules obtain:

12. You can retrieve the last entry made in any text box during the current session by pressing <F3>.
13. Lender and Patron entries are made from the appropriate List.
14. The Dept box is always filled with the Dept filed with the Patron.
15. Entries with Combo Boxes respond to typed entries by travelling down the list of choices.
16. ISSN and Title boxes present a list matching the first three letters typed and then travel down that list for each additional letter typed. Press Enter when the correct item is reached.
17. Lender Charge and Local (Patron/Dept) Charge boxes are completed with the default charge filed for that Delivery Method in the Lending Library and Patron record specified.
18. The Max Cost box is automatically given whatever value is entered in the Charge text box.
19. Date fields and Combo Boxes retain the values from the previous entry as defaults.
20. All citation information (including Month) can be typed in lower case and QuickDOC will attempt to reformat after you press Enter for that field (you can press the Up Arrow, or Shift-Tab, to return to a previous field if the automatic format is not to your liking).
21. When typing in page numbers, if you press the dash (-) after the **Start Page** the cursor will jump directly to the **End Page**.
22. The Print Copy Checkbox will retain its last value (True or False) from session to session.
23. The Alt-A accelerator key will work to simulate a click of the Add Record button from anywhere on the form

The complete Add Borrow Item form will look like this:



The **Borrow Note** field (not shown above) appears just above the yellow Help box and permits entry of 50 characters. The Payment Number for any **Payment to Lender** always appears at the beginning of this field and should be left in that position, with other information added after it.

The **Print Copy checkbox** determines whether a printout of the information for this request will be after the record is added. If you want hardcopy printouts of each item added, check this box. Once the box is checked (or unchecked), that value is filed in the tblLocals table of QuickDOC.MDB as

PrintBorrowAdd = True

and becomes the default thereafter.

Requests are printed two to a page, so you won't actually see the first printout until after the second request is entered. If the Exit button is clicked after an odd number of records were added, the last request will be printed at that time on a page of its own.

Since these printouts use your Default Printer, it will also use whatever default settings your printer was left at during your last print job. Watch out for situations where the printer was left at Landscape instead of Portrait, or where some other application set the printer to some special setting and never reset it back. Strange characters may result in the latter case. Turning the printer off and on will usually reset the default settings.

Print Format of Added Borrow Request

Borrows added using the Add Borrowed Item Form have the following format:

Added Borrow Request Number: 44296
Date Added: 7-Nov-01

Journal Title:	Cortex; a J devoted to study of nervous sys
Citation:	2000 Apr;36(2):195-211
Article Title:	New learning and remote memory.
Article Author:	Poliakoff E
ISSN:	0010-9452

Request Status:	Received	**Source of Request:**	DOCLINE
Item Type:	Journal	**Item Form:**	Copy
Delivery Method:	Mail	**Referral Reason:**	NOT
Copyright:	CCG	**Purpose of Request:**	PC
Patron:	Coletti, Margo		
Dept:	LIBR		
EFTS Pmt:	False	**Rush Request:**	False
Lib Charge:	$11.00	**Local Chrg:**	$11.00
Sent To:	ILUAMA	**Local Del Method:**	Interoffice Mail
Date Sent:	7-Nov-01	**Local Status:**	Open
Date Recd:	7-Nov-01	**Cost Center:**	
Date Paid:		**Date Paid Local:**	

Local Information

Values in this group are related to **Local Billing** and management of **returnable items**. The **Local Chrg** (Pat/Dept Charge) is the amount that will be (or has been, if it's already been paid) charged to the local Patron, Department or Cost Center in Local Billing. Anything entered in **Pat/Dept Chrg** will be saved in all three Charge fields (**LocalCHRGAsPatron**, **LocalCHRGAsDept** and **LocalCHRG**) in **tblBorrLocals**.

The **Local Delivery Method** refers to the method by which the item goes from the Document Delivery operation to the Patron. It is often the same as the main Delivery Method (and will always be the same if the item is shipped directly to the Patron) but may also be different. **Pickup is the default**, but if you change that method, the new method will become the default for the next item added.

Local Status is either Open, InvPat, InvDep, PaidPt or PaidDp.

Date (Local Item) Paid is for the local (Patron, Dept, Cost Center) payment, not the payment to the Lender.

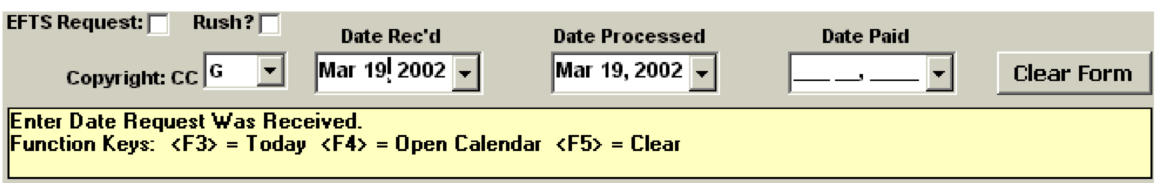
Date Due (back to the Lender) can be entered for Returnable items.

Date Returned (to the Lender) can also be entered for Returnable items.

Local Invoice # is for cases where you are re-entering an item for which an Invoice has already been sent.

Dates on Added Borrow Records

Today's Date will be the default date for records added, but previous values are kept from record to record in most cases, so that repetitive data entry might be reduced. In all data entry Date fields, the format is now **mmm dd, yyyy**, so that International dates can be entered in a format understood no matter what the machine's Date setting format might be. If you press "D" in the Date Rec'd text box, below, the entry will jump to "Dec" since that's the only match. You can also use the dropdown calendars, as always, for entry of dates.



Entering Multiple Borrow Records

There are **function keys in Add Borrow Data Entry Fields** that may help with data entry when entering multiple records.

The <F3> Function Key will Restore the Previous Entry in this field.

The <F5> Function Key will Clear this field.

The **function keys in Add Borrow Date Fields** have specific duties:

The <F3> Function Key will enter Today's Date.

The <F4> Function Key will display the Calendar (useful if your hand is on the keyboard, not the mouse).

The <F5> Function Key will Clear the field.

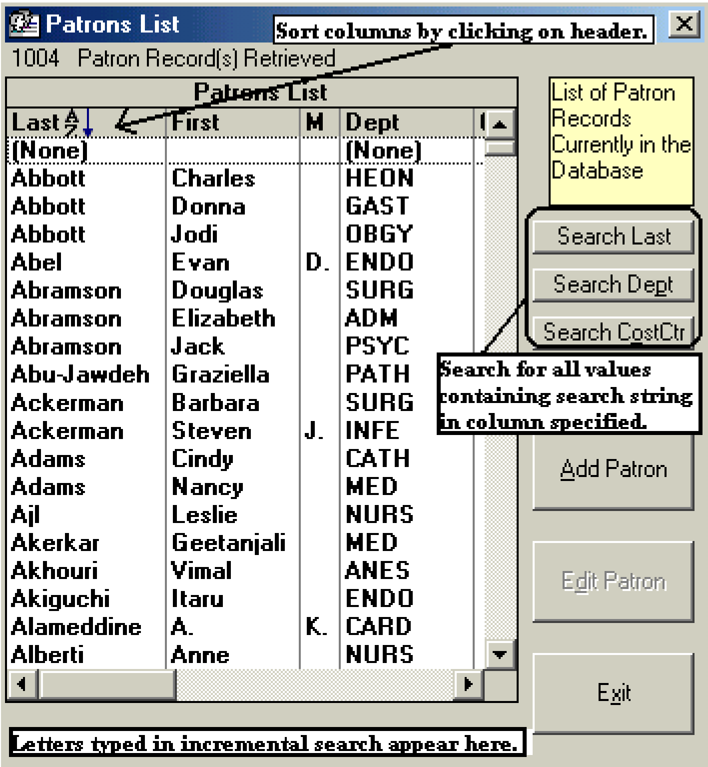
Patrons

Records for Patrons are held in the QuickDOC.MDB database primarily in the **tblPatrons** Table, with associated records in **tblPComms**, **tblPDCharges**, **tblPatronPrefPmts**, **tblPDAddrs**, **tblPrefixes**, **tblStatus** and **tblSuffixes**. Lists of Patron records are available in a column on all Borrow Grids, as well as through the Patrons List.

The Patrons List

Displaying Patrons

Records for Patron are primarily accessed through the **Patrons List** (on the Toolbar) as well as under "**Lookup**" on the **Menu Bar**, under Patrons. The Patrons List also pops up in other places, such as when you're adding a new Borrowed Item, or when searching by Patron in the Local Billing Grid, so that the Patron can be chosen from the list.



The list shows the Patrons in your file alphabetically **by Last Name**, which is the default sort order. Start typing the first few letters of the Last Name to jump ahead on the list, or use either the Down Arrow key or the Page Down key or the scroll bar at the right of the list to navigate further. (the **None Record**, by the way, is a place saver for No Patron, and can be used in records where the Patron name is unimportant, or when you want to delete a Patron record while the Patron you want to delete still has backfile activity in the database. The horizontal scroll bar at the bottom will expose the Cost Center column of the list if you drag it to the right. If you hold the cursor over any entry that is wider than the column width, a tool tip will appear with the full name visible.

As an item is selected (either by clicking on that line or by pressing Enter after moving down the list until the Patron you want is highlighted), the **Edit Patron Button** is enabled (to switch from Edit Patron to Add Patron, click '**Clear Choice**'; the List will then be set to the topmost entry and the **Add Patron Button** will be enabled).

Searching for a Patron

You can search the Patrons List for specific matching entries by clicking on one of the search buttons. You can search the Last Name column, the Department column, and the Cost Center column. When you click the appropriate button, an input box will pop up. Enter any amount of characters you want matched and the list will then display only those records where that matching group of characters appears anywhere in the field.

To choose or edit a Patron, click on the line that contains the entry you want: the '**Edit Patron' Button** will be enabled and that Patron will be your current choice.

To **reset the Patrons List** after a search to its full number of entries, click once on any item in the list to highlight it, and then either click the Clear button or click the header at the top of the Last column to start the sort on that column.

Sorting the Patrons List

You can sort the Last Name, Department or Cost Center columns in ascending or descending order by clicking on the header at the top of the column.

Deleting Patrons

Click the Edit Patron button to bring up the complete Patron Information Form, and then click the **Delete Patron button** on the lower right of the General Tab.

If the Patron has any activity in the database, other than in the tblPatrons Table, itself, you'll first need to transfer that Patron's activity to the (None) Record by using the **Transfer Activity button** and pointing to the **(None) Patron Record**. See **Transfer Patron Activity to (None)** under Patron Information Form, General Tab, below, for more information.

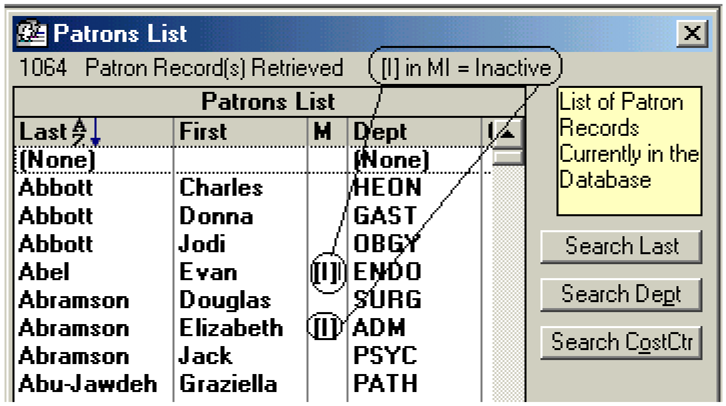
While the **Transfer Activity button** will do the job, changing the Patron referred to in a variety of Tables from the real Patron to the placeholder (None), the default record, it's worth considering what might be lost. First of all, there will be no Patron to refer to in future reports. While the Dept and Cost Center information for each request will remain, any Patron-related information (such as Patron Status or Suffix) will be unavailable for reporting purposes. **Local Payment information** will also be transferred to the (None) Patron record, where it's aggregated with all the other (None) transfers. And finally, **once this transfer is made, there is no easy way to reverse it**.

Editing Patrons

Click the Edit Patron button to bring up the complete **Patron Information Form**. Double-clicking a line is the equivalent of selecting it and clicking the Edit Patron Button, and will also open the Patron Information Form.

Inactive Patrons

Inactive Patrons are not included in the Patron List that displays in **QDPortal** at the upper right of the screen during the DOCLINE session. On the Patrons List in the main QuickDOC program, they are displayed, but with an [I] (for Inactive) at the beginning of the MI field to alert you to their status:



The **[I]** is actually included at the beginning of the **Middle Initial field** and is automatically added or removed when you change the Active status on the **Misc Tab** of the **Patron Information Form**. Consequently, while it is possible to add it or remove it directly, checking or unchecking the Active checkbox is the preferred method (since adding an [I] to the MI field won't actually change the Active value!). Because it's added at the beginning of the field, it preserves the actual Middle Initial, but only if that value is 3 characters or less, since the maximum length of that field is six characters.

Patron Information Form

The Patron Information Form consists of five tabbed forms, located by clicking on the Tabs at the top of the form or by pressing Enter (or the Down Arrow) in the last control on the previous form, except on the Misc Tab, which is the last Tab visible. Pressing an Up Arrow from the topmost control of any form except the General Tab will move back to the previous Tab.

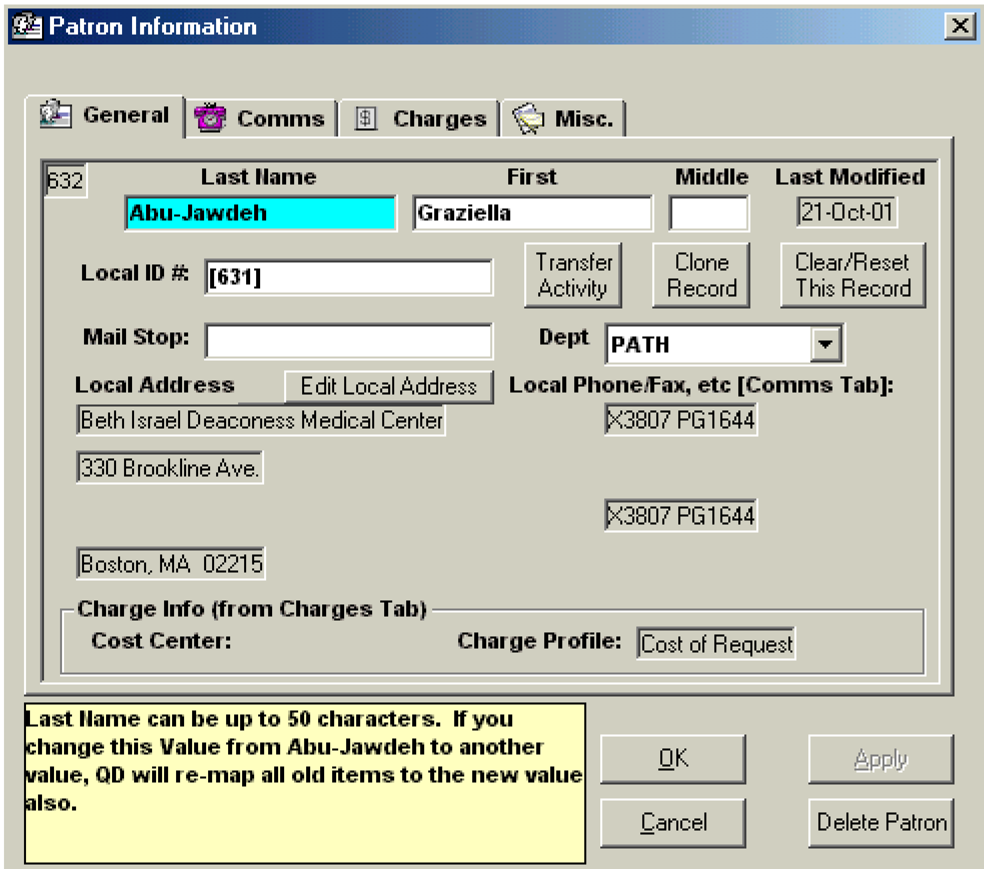
Patron Information Form – General Tab

The General Tab presents general Patron information, along with a snapshot of values set on other Tabs, including Local Address information; phone, fax and email data; Cost Center and Local Charge Profile.

The **LastName** and **First Name** fields are self-explanatory. The **Middle** field is technically for Middle Initial, but it can hold up to six characters, so it may contain an entire middle name (especially if this helps to differentiate Patron records) in some cases. The **Local ID Field** will initially contain the old DOS QuickDOC Patron Number, if you have imported Patrons from old QD, but is thereafter free for use in whatever scheme you have, locally, for identifying Patrons (Employee Number, SSN, etc.). The **Mail Stop** field is for local mailing address, usually a **Room Number** or **PO Box**.

The **Dept** (Department) field is a dropdown combo box with all registered Departments listed. If you **change the Dept value in a Patron record**, you will be asked (when you have finished editing and click either Apply or Ok) whether you want this **new Dept value to replace the old value in QuickDOC.MDB** for any instance of the Patron record in QuickDOC.MDB. You can see the Message Box below, in the Clone Patron section.

If you say Yes, then all values in any table of the QuickDOC database that also hold a separate Department value will change that Department value to this new one. This is an easy way to make a **Global Department Change for any Patron**.

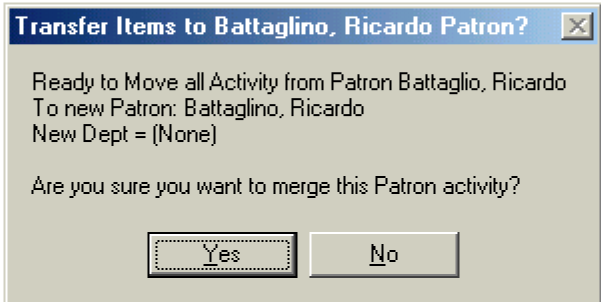


The remainder of this Tab shows current values from other Tabs (to permit one-stop lookup of common values; if you want to make a change to one or more of these values, move to the Tab specified) plus various command buttons for performing certain functions or accessing the Local Addresses form.

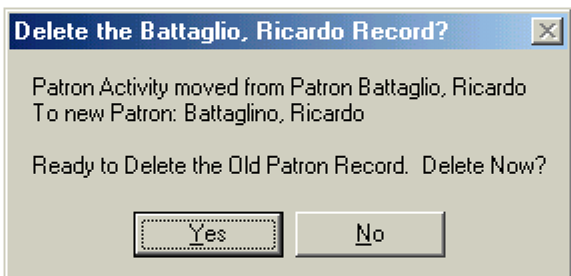
Transfer Patron Activity

This is a quick way to **Merge Patron Records**. To transfer activity from one Patron record to another, use the following steps:

1. Compare the old Patron record to the new, adding any unique data from the old record to the new record on the appropriate Tab.
2. Bring up the old record, and click the **Transfer Activity button**.
3. The Patrons List will appear. Choose the Patron you want to transfer activity **to**.
4. A message box will appear (as illustrated here for a transfer using two patrons with nearly identical names):



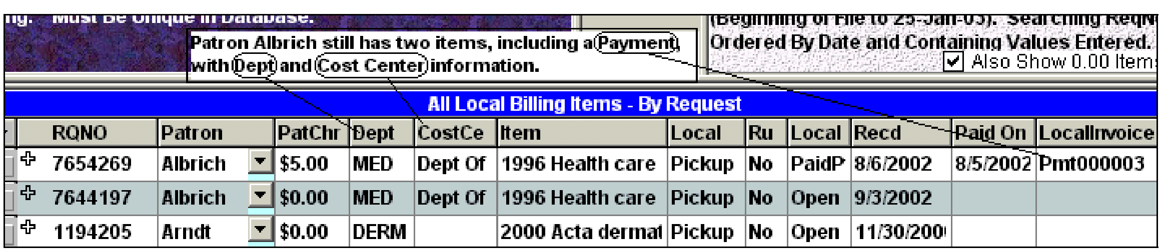
5. Click **Yes** if you want to move all activity in the database that is now assigned to the patron on the first line to the patron on the second line.
6. Click **No** to back out of the entire deal.
7. If you click Yes, all the activity assigned to the first patron in any table within QuickDOC.MDB will be assigned to the second patron. You'll next be asked if you want to delete the old record:



8. Click **Yes** to delete the old record (the usual choice) or **No** if you want to keep it around for some reason.

Transfer Patron Activity to (None)

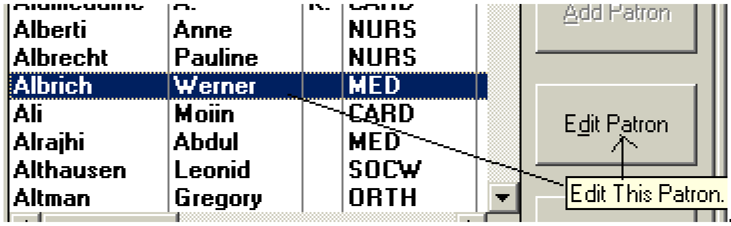
This is the way to **Delete a Patron Record while preserving all its associated item records**. As an example, Patron Allbrich, in the Grid below, is seen to have two records in the database (this was an All Records search using the By Dates button), both Received in 2002 and one of them with an associated charge of $5.00 paid by the Patron. Both records have a Dept, MED, and a Cost Center, which happens to be Dept of Medicine, rather than a numeric value.



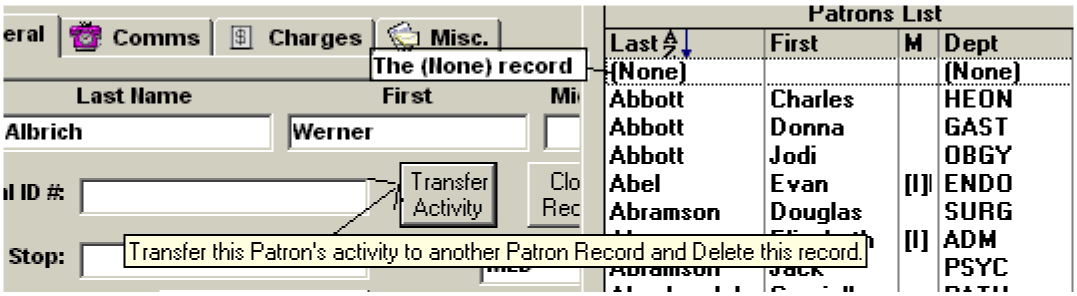
RQNO	Patron	PatChr	Dept	CostCe	Item	Local	Ru	Local	Recd	Paid On	LocalInvoice
7654269	Albrich	$5.00	MED	Dept Of	1996 Health care	Pickup	No	PaidP	8/6/2002	8/5/2002	Pmt000003
7644197	Albrich	$0.00	MED	Dept Of	1996 Health care	Pickup	No	Open	9/3/2002		
1194205	Arndt	$0.00	DERM		2000 Acta dermat	Pickup	No	Open	11/30/200		

To delete Patron Albrich, while retaining the other values, use the following steps:

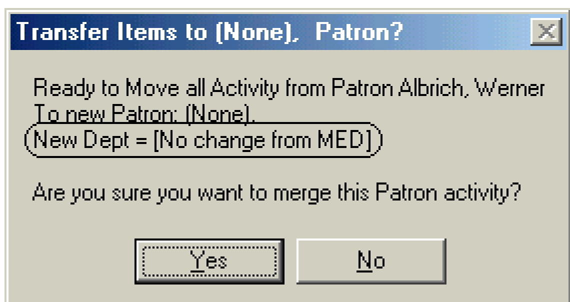
1. First edit the Patron by clicking Edit Patron on the Patrons List



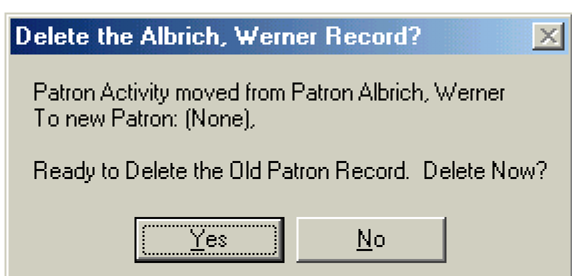
2. Bring up the old record, and click the **Transfer Activity button**. The Patrons List will appear. Choose the (None) record at the top of the form.



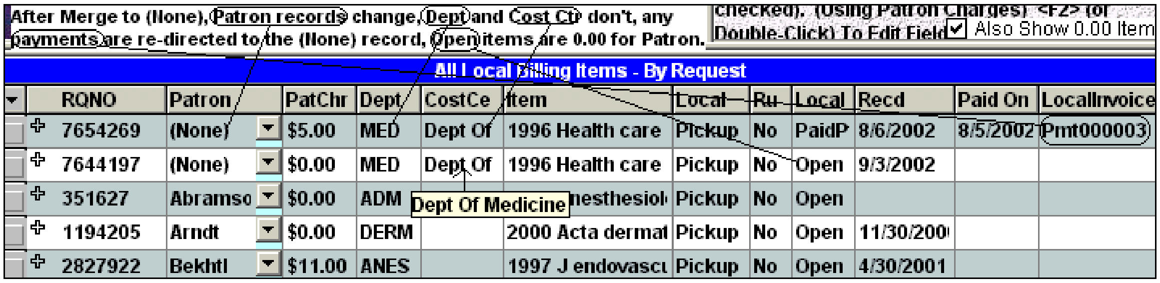
3. A message box will appear referring to the prospective transfer (and also noting that the Dept value will not be replaced):



4. Click **Yes** if you want to move all activity in the database to the (None) record.
5. Click **No** to back out of the entire deal.
6. If you click Yes, all the activity assigned to the patron in any table within QuickDOC.MDB will be assigned to (None). You'll next be asked if you want to delete the old record:



Click **Yes** to delete the old record. A look at the two Albrich items in the Local Billing Grid will now appear as



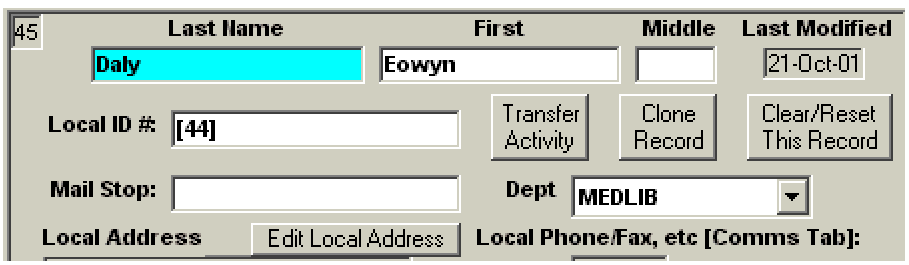
RQNO	Patron	PatChr	Dept	CostCe	Item	Local	Ru	Local	Recd	Paid On	LocalInvoice
7654269	(None)	$5.00	MED	Dept Of	1996 Health care	Pickup	No	PaidP	8/6/2002	8/5/2002	Pmt000003
7644197	(None)	$0.00	MED	Dept Of	1996 Health care	Pickup	No	Open	9/3/2002		
351627	Abramso	$0.00	ADM		nesthesiol	Pickup	No	Open			
1194205	Arndt	$0.00	DERM		2000 Acta dermat	Pickup	No	Open	11/30/200		
2827922	Bekhtl	$11.00	ANES		1997 J endovascu	Pickup	No	Open	4/30/2001		

As you can see, the Patron Name Albrich has been replaced with (None). Dept and Cost Center remain the same. The payment remains, but it is now assigned to (None) as the Patron making the payment in the **tblPatPayments** (table of **Payments made by Patrons**).

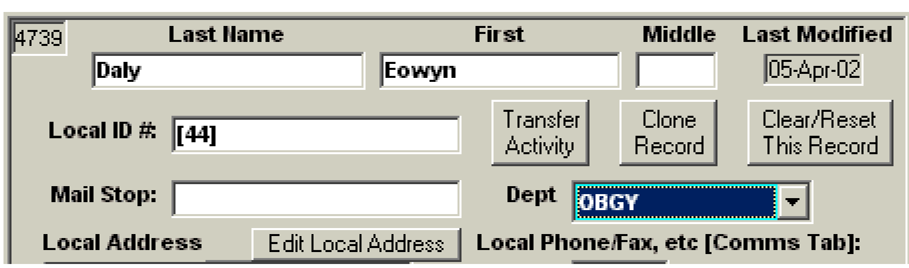
Clone Patron

This is a quick way to create a **Second Matching Patron Record**. To make a clone of the current Patron Record, click the **Clone Record button**. The primary use for which the Clone Button is intended is to create an exact copy of the current patron record, which will then be available for changing only the field(s) necessary to distinguish between the two. Typically, if you have a Patron whose requests should be charged to **more than one Cost Center or Department**, you'll need to make two records for that patron: one for each Cost Center or Department, so that you can choose the correct assignment right at the point of first entry. Use the following steps:

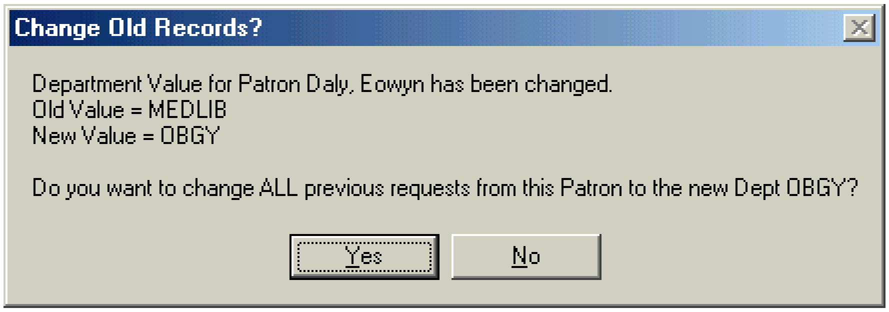
1. Make the first Patron record (if it hasn't already been made) using one of the two (or more) Cost Centers or Departments. Here's an initial record, with the initial Patron record number (45) at the upper left corner:



2. To create the clone, click the Clone Record button, and a new record, with a new Patron number (4739, below), will be the current record. All the record's values (except the Patron number) will be the same as the first record. Change the field (e.g., the Department field, below, changed to OBGY, or the Cost Center field on the Charges Tab), necessary to make this record distinctive:



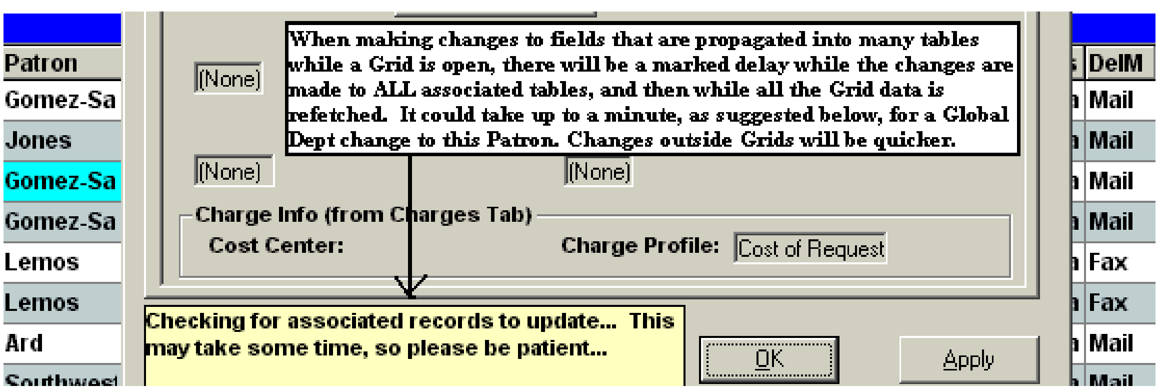
3. Make any other changes for this new record and click Ok. If you made the change, as above, in the Dept field, QuickDOC will ask whether you want to **change ALL previous requests from this Patron to the new Dept** (as it does with any Dept change in a Patron record):



4. Since there aren't any 4739 Eowyn Dalys in any table (the search is by Patron Number, not Name, and any Eowyn Dalys with activity will be under the first Patron Number, 45, not this one, 4379, since we just created it), you can safely click either button. Most will click No, I would guess, in any event.
5. When you click Ok to finish you'll find yourself back in the Patrons List and you'll see this new Daly, Eowyn record in the List, with the new Dept, etc. In addition, this new record will now also be listed, right beneath (or above) the first one, in the Patrons List that appears in QDPortal online, so that you can select the correct Patron/Dept/Cost Center at the time you send the request.

Editing Patron Name or Dept From a Borrow Grid

When you come to the Patron Information form by clicking the **To Patrons button** on a Borrow Grid, you can make Patron Last Name, First Name and Dept changes, along with changes to any other fields in the Patron record. When you make changes to the first three fields, however, changes must be cascaded through many other **associated tables** in QuickDOC.MDB. And when this cascading occurs while a Grid is displaying data, the Grid must be closed, the changes made (if any), and the Grid re-fetched and re-displayed. Since this may take some time, you'll see a message displayed while the Edit form remains visible:



Since the wait can seem interminable while you're itching to get on with more changes, it makes sense to make any extensive changes to Last Name, First Name or Department fields using the Patrons List rather than the To Patrons button on a Borrow Grid. But if you do make changes from the Grid, just be patient: the hourglass really will go away, eventually.

Clear/Reset Patron Record

Clicking the **Clear/Reset This Record Button** on the Patron Information General Tab sets all values back to their defaults for an empty record and prepares for the creation of a new record. The values on the form are the same as if you had arrived here by clicking the Add Record button on the Patrons List.

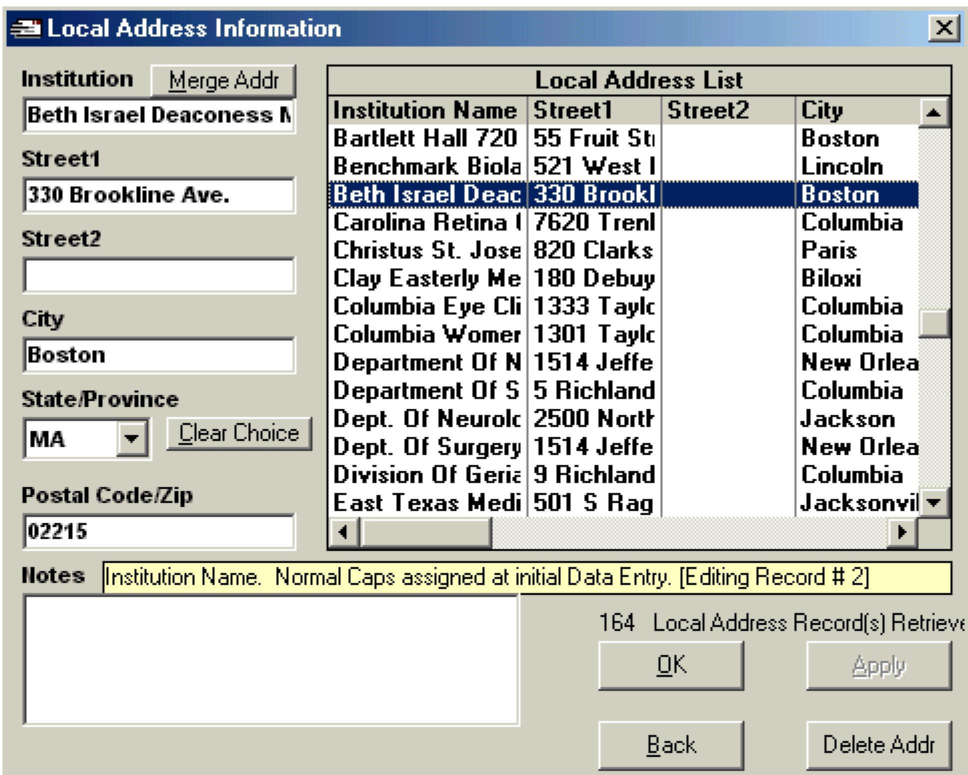
Local Addresses Form

The Local Addresses form is available from either the Patron Information form or the Department Information form by clicking the **Edit Local Address button**. Because addresses for Patrons and Departments are often identical, it makes sense to save this information once and assign it to individual Patrons or Departments rather than repeat it for each Patron or Dept record.

This information is stored in **tblPDAddr** in QuickDOC.MDB and can be added to or edited by clicking the Edit Local Address button on the General Tab of either the Patron or Department Information forms.

Each **local address record** is given a unique record number in the **PDAddr Table** (the record number for **Institution Name (Address)**: Beth Israel Deaconess; and **Street1 (Address)**: 330 Brookline Ave.; is 2, in the sample below), and that record number (field **PDAddrID** in the PDAddr Table) is then assigned, if selected, to Patron and Department records when choosing the Local Address from the combo box (it's held in the **PatronAddrID** or **DeptAddrID** field of the appropriate table).

Anytime an address is needed for a Patron or Department, a lookup is made in tblPDAddr for the values in the record number of the appropriate AddrID field. The **Local Address Information** Form looks like this:



Institution Name: This will be the General Institution in most cases but may also be an alias or internal moniker. It may be a completely different **institution for Loansome Doc Patrons**. It may also be blank, which may signify no local institution or the default local institution or just a missing value. You can see that the potential for duplicates here is fairly strong. The **MergeAddr button** will be useful to bring these duplicate (or redundant) addresses together. The field name is **PDAddrInstName** and allows 60 characters.

Deleting a Local Address

To delete a Local Address, click on it on the list, to move the values into the edit boxes, and then click **Delete Addr**. If the address hasn't been assigned to any Patron or Department, then the delete will be performed. If it is assigned to any Patron or Department, you'll get a message box:

Reassign any Patron or Dept records and try deleting again.

Automatic Capitalization

In most cases, when you are entering information into a new field (no previous data value), QuickDOC will try to capitalize entries based on a rule. Usually it's the first letter capitalized for each word, but the Help box that displays when the field is entered will usually let you know what kind of capitalization or formatting will be applied to any entries in that field.

Whenever (as above) the help box says something like "**Normal Caps assigned at initial Data Entry**" it means that QuickDOC will try to assign **automatic capitalization** based on the initial letters of words typed into that field. In the Institution Name field above, if you were creating the record, you could type "beth israel deaconess medical center" into the Institution box and, after you pressed Enter or Tab or clicked on another box, the entry would re-assemble itself and print out in the box as "Beth Israel Deaconess Medical Center," with the first letters of each word in **uppercase**, which happens to be as it should be.

But what if you wanted an institution named "BIDMC Medical Center?" If you type "bidmc medical center" into the Institution box and press Enter, you'll see "Bidmc Medical Center" after pressing Enter, which is close but not exactly what you wanted to enter. Unfortunately, even if you type "BIDMC Medical Center" in most of these fields, it will first re-set to **lowercase** characters and then apply the capitalization to the first letters, with a result exactly like the first.

If you're worried about the capitalization that might be applied, enter the value in its proper format and press Enter. Any format/capitalization changes will be applied and displayed immediately. If they are not to your liking, press the UpArrow key or Shift-Tab or just click back into the field you're not satisfied with and re-type the correct field values, just as you want them to be displayed. In the case above, manually change the "idmc" in the field to "IDMC" and press Enter. Once the field has an actual value, entries are no longer vetted for capitalization and are assumed to be edits.

The general rule is that, for **initial entries into empty fields**, QuickDOC tries to add the proper **capitalization**, so that you don't need to think about Shift Keys while entering information. But if this should result in a bad capitalization format (like Bidmc or Nih), just register the change (by pressing Enter or Tab or clicking on another box) and then click back (or press Shift-Tab) into the box where the change needs to be made to correct the format (change idmc to IDMC or ih to IH), and then Enter (or Tab or anything to exit that box) so that the change can be registered. (Box should now read BIDMC Medical Center or NIH or whatever.)

Street1 is the first line street value of the address. **DON'T** use the **Mail Stop** value (usually Room Number or local PO Box) since this is held in individual Patron or Department records. The field name is **PDAddrStreet1** and allows 60 characters.

Street2 is the second line street value of the address. **DON'T** use the **Mail Stop** value (usually Room Number or local PO Box) since this is held in individual Patron or Department records. The field name is **PDAddrStreet2** and allows 60 characters.

City is the city of the address. The field name is **PDAddrCity** and allows 60 characters.

State/Province is the State or Province of this Address Record. It's selected from the dropdown list of StateProvs. To be eligible for entry in the State/Prov field of any QuickDOC Table, the entry must already exist in **tblStateProvs**, the State/Provs Table in QuickDOC.MDB. If your entry isn't in the dropdown box, first edit (or add to) the StateProvs Table and then start up QuickDOC again; the new values should be in the dropdown box. The field name is **PDAddrStateProv** and allows 6 characters.

Postal Code/Zip is the Postal Code of the address. The field name is **PDAddrPostalCode** and allows 20 characters.

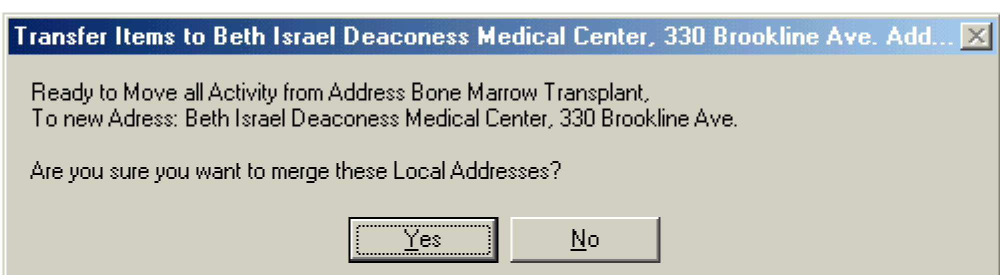
Notes on the address record can also be entered. The field name is **PDNote** and allows 50 characters.

Unique records in the PDAddr Table are identified by the combination of the Institution, Street1 and Street2 fields. Because the matching value might be in either Street1 or Street2 for a specified Institution value, both are searched when looking for duplicates. Nevertheless it will be common to see duplicate records, especially when one or another of these three values have been left blank. It is therefore expected that the Merge Addr button will be used, from time to time, to reconcile these near duplicates.

Merge Address Records

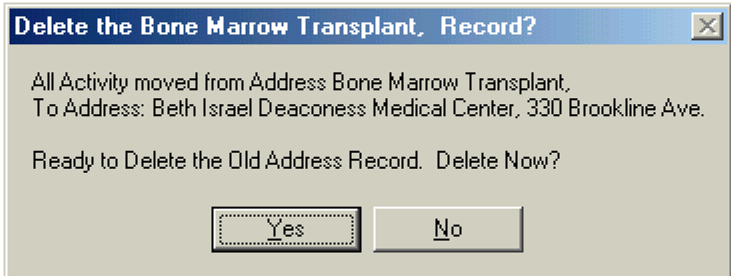
This is a quick way to **Merge Duplicate Address Records**. Any Patrons or Departments using the old record number will be switched to the new. Use the following steps:

1. Compare the old Local Address record to the new, adding any unique data from the old record to the new record.
2. Bring up the old record by clicking on it in the **Local Address List**, and click the **Merge Addr button**.
3. You'll then be instructed to choose (again from the Local Address List) the record you want to transfer activity **to**.
4. When you click the row for the new address record, a message box will appear so that you can confirm your choice:



5. Click **Yes** if you want to move all Patrons or Depts now assigned to the old address (Bone Marrow Transplant, in this case) to the new address (Beth Israel Deaconess).
6. Click **No** to back out of the entire deal.

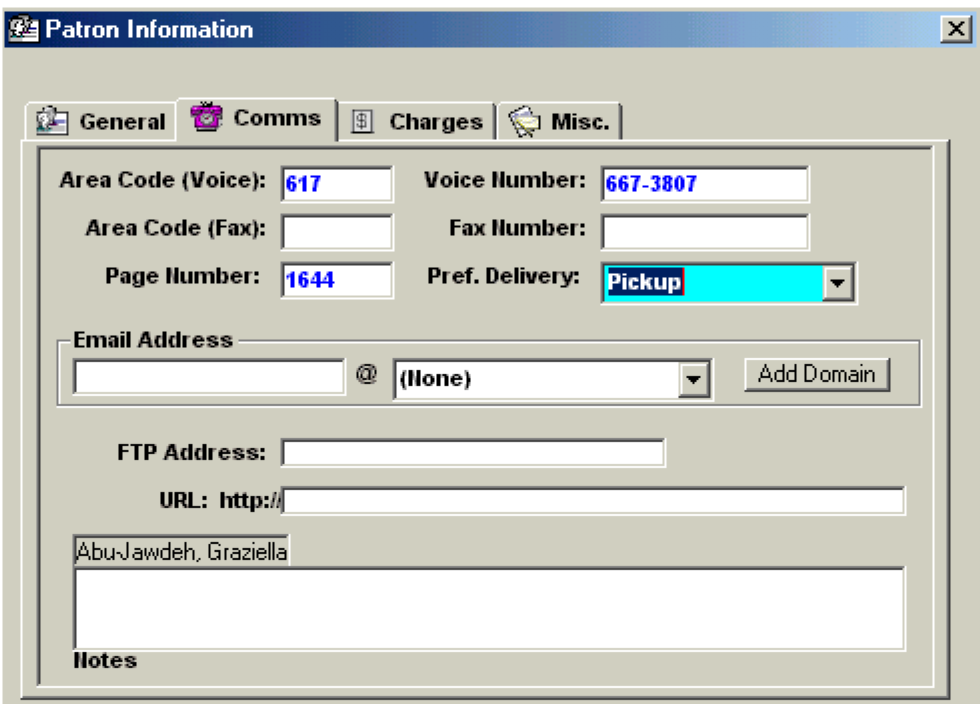
7. If you click Yes, all Patron or Dept records with the old Local Address ID will be assigned the new Local Address ID number. You'll next be asked if you want to delete the old record:



8. Click **Yes** to delete the old record (the usual choice) or No if you want to keep it around for some reason.

Patron Information Form – Comms Tab

The Comms Tab has local communications information. For Loansome Doc Patrons, some of this information may have been imported from a DOCLINE request, if it was available there.



This information is stored in **tblPComms** in QuickDOC.MDB and is associated with the main Patrons Table with a matching ID Number (it matches the Patron Number). The field name is **PCommID**.

Area Code (Voice) is telephone Area Code. The field name is **PCommAreaVoice** and allows 10 characters.

Voice Number is rest of the Voice number, including any extension. The field name is **PCommVoiceNumber** and allows 20 characters.

Area Code (Fax) is fax Area Code. The field name is **PCommAreaFax** and allows 10 characters.

Fax Number is rest of the fax number, including any extension. The field name is **PCommFaxNumber** and allows 20 characters.

Page Number is the Patron's pager number. The field name is **PCommPager** and allows 15 characters.

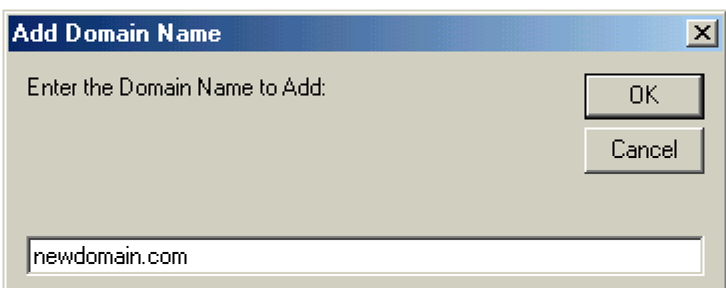
Preferred Delivery is a note on how the Patron prefers to receive the item. It reveals a dropdown Combo Box with whatever values are in the **Local Delivery Methods** (**tblLocalDeliveryMethods**) Table of QuickDOC.MDB. Default values are similar to the DOCLINE Delivery Methods: **Ariel**, **Email (pdf)**, **Email (tiff)**, **Fax**, **Mail**, **Pickup**, with some obvious additions: **FedEx**, **Interoffice Mail**, **Messenger** and Other. These values may take on more significance in the future as more items are delivered automatically and to the Patron's desktop. The field name is **PCommPrefDelivery** and allows 20 characters.

Email Address comprises two boxes. The first, a text box, is for the name part of the Patron's email address (the part before the @ sign). The field name for this part is **PCommEmailAddr** and allows 50 characters. The second box is a combo box that reveals a dropdown list of **local domain names** used by known Patron or Dept email addresses. This list is stored in the **Local Domains** (**tblLocalDomains**) Table of QuickDOC.MDB. To conserve space, each Domain Name in tblLocalDomains is identified by a number in the **LocalDomainNumber** field, and it is this number that actually resides in the Patron or Dept record. The actual name is stored in the **LocalDomainName** field of tblLocalDomains, and it is the list of names derived from this table that appears in the dropdown combo box. (None) is the default record and will appear if a Local Email Address is unknown. Because **Loansome Doc Patrons** are counted as local Patrons, this list can become fairly extensive if you have a large number of Loansome Doc users. The field name in the tblPComms record is **PCommLocalDomain** and is a number field reflecting the LocalDomainNumber in tblLocalDomains.

If the current domain name is the (None) record, you can either add a correct domain name from the dropdown list or, if the correct Local Domain isn't on the list, click the **Add Domain button** to add it (this button will read **Edit Domain** if a value other than (None) is in the Domain Name box).

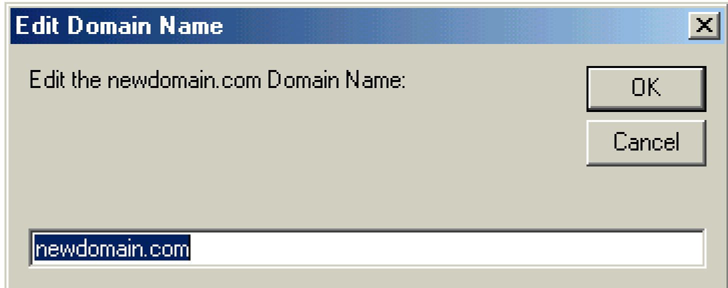
Adding a Domain Name

To add a new domain name to tblLocalDomains (and to the dropdown combo box), click the Add Domain button when the current value is (None). You'll see the **Add Domain Name Input Box**:



Simply enter the new domain name in the input box and press Enter or click Ok. The new domain name will be added to the Local Domains Table and appear also in the current dropdown combo.

The command button will change to Edit Domain, which allows for editing of a domain name.



Any changes made to a Domain Name entry will of course be reflected in all Patrons or Departments with email addresses matching that domain. This is a fairly easy way to make those dreaded email address changes post-merger, from oldhospital.com to newhospital.com, so long as everyone is included in the change. If some will keep the old domain, then you'll either have to create a new domain name and individually assign each changing Patron or Dept to it or do the edit to the new name and then create the old name again and assign each non-changing Patron or Dept back to it. Not an enchanting proposition either way, but you can choose whichever method yields the fewest individual edits.

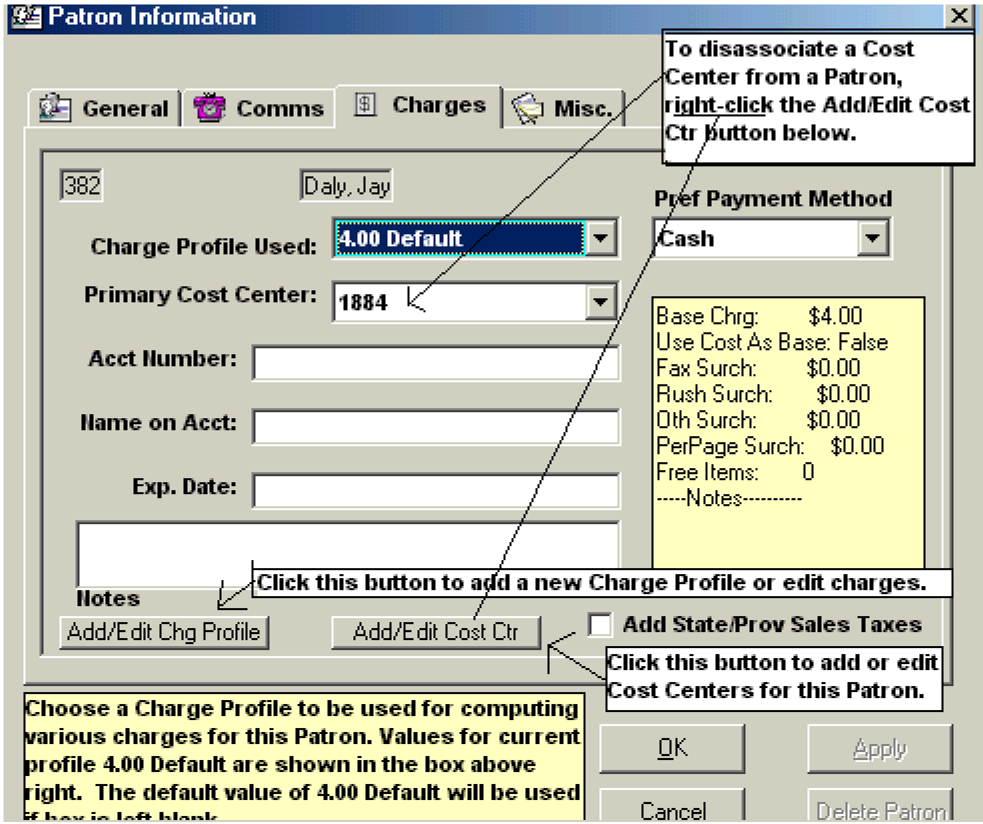
FTP Address is for any Patrons who participate in delivery of documents via FTP (or Ariel, for that matter, which is a variety of FTP). This may not apply to many Patrons at this point, but could change in the future. The field name is **PCommFTPAddr** and allows 50 characters.

URL: http// is for adding a web site for any Patron who wants this information known.. This does not have much application at this point, and is included for information only. The field name is **PCommHTTPAddr** and allows 250 characters.

Notes on the various values of this Tab can also be entered. The field name is **PCommNotes** and allows 100 characters. The PComms Table also has a **PCommTimeStamp** field to track **changes made by concurrent users** so that anyone trying to make a change to a record that was changed by another user during the time it was checked out to edit by the first user will be so notified and asked to first check the revised record before making a further alteration.

Patron Form – Charges Tab

The Charges Tab contains information about charges and payment options. Charge Profiles determine the default charge that is applied when an item is received and is filed with the BorrowItem record in the associated **tblBorrLocals** record's **BorrLocalCHRGAsPatron** field (there is also a matching **BorrLocalCHRGAsDept** field that will be used if the Invoice or Payment is ultimately made using a Department Invoice or Payment). While this default can always be changed in individual items, having the default charge be as accurate as possible can save a great deal of editing later on.



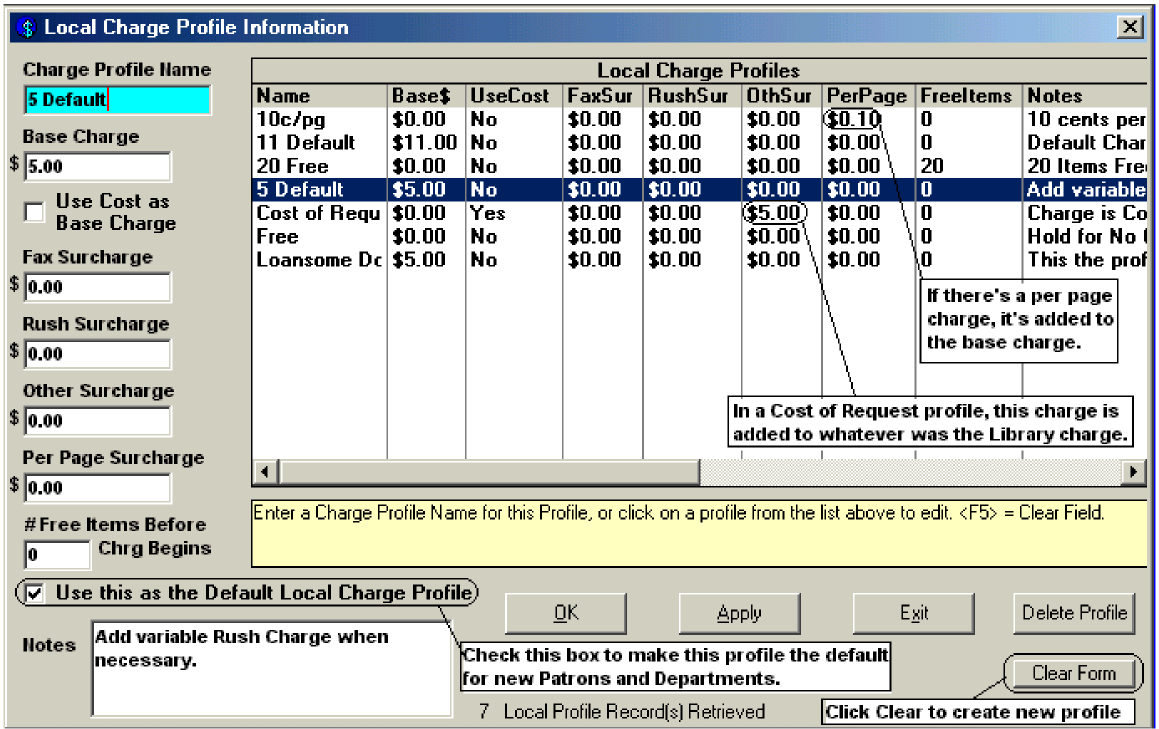
This information is stored in **tblPatronPrefPmts** in QuickDOC.MDB and is associated with the main Patrons Table with a matching ID Number (it matches the Patron Number). The matching field name is **PatronPrefPmtPatronRec**. There is also an unrelated unique key field, **PatronPrefPmtID**, which will allow for multiple Patron Preferred Payment records at some later date.

The **Primary Cost Center** field contains the main Cost Center used by this Department. Additional Cost Centers can be added using the **Add/Edit Cost Ctr button**, to bring up the **Add/Edit Cost Center Form**. Values other than the Primary value will appear in the Dropdown box.

Charge Profile Used is a combo box used to select Charge Profile to be assigned to this Patron. Charge Profiles for both Patrons and Departments are held in the **PDCharges** (**tblPDCharges**) Table in QuickDOC.MDB. In the Patron record, this value is stored in the Patrons Table, rather than in the PatronPrefPmts Table, in the field PatronPDChargesID. Charge Profiles must be assigned to each Patron (they will otherwise be assigned the Default) and are filed with the patron record. The **PatronPDChargesID** field can be up to 20 characters and must match a value in tblPDCharges.

To **edit or add a Local Charge Profile from the Patron Information form**, click the **Add/Edit Chg Profile button** to bring up the **Local Charge Profile Information** form.

Local Charge Profile Information Form



Local Charge Profiles can be named in any fashion that makes the most sense locally. In the case above, the name "5 Default" is used to suggest a $5.00 default charge for Patrons and Departments. The **Use this as the Default Local Charge Profile** checkbox is checked, which indicates that this profile will be applied to any newly created Patrons or Departments.

To change the default, just bring up another profile and check the checkbox on that one. Since there can only be one default at a time, checking the box on one profile effectively unchecks it for all the others.

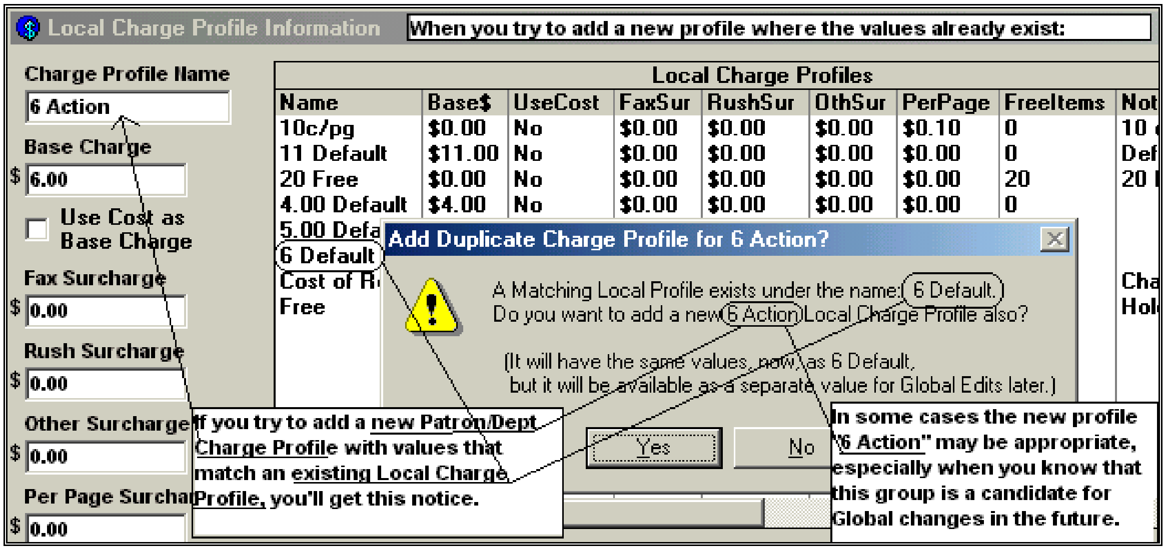
If we were to change the Base Charge in the "20 Free" profile to $10.00, we would create a profile where the first 20 items are provided free to those with this profile, while any after that are charged at the chosen Default rates: $10 **Base Charge**; No in answer to **Use Cost As Base**; a **Fax Surcharge** of $0.00; a **Rush Surcharge** of $0.00; an **Other Surcharge** of $0.00; a **Per Page Surcharge** of $0.00; and 20 in the **Free Items Before Charge Begins** field. QuickDOC computes the **Free Items Before Charge Begins** on the fly, adding the base charge only after the free items total has been reached (currently set on a Calendar Year basis, but a Fiscal Year setting will be forthcoming).

[The **Other Surcharge** field is used to apply **a standard surcharge on any request**, over and above the charge computed from the other columns. In reality, it is only used in cases where the **Use Cost As Base box** is checked and you want to add another standard charge to whatever it is that you paid for it. Otherwise, it's just as easy to put the extra charge in Base Charge, which is also applied against each item. Like the Rush and Fax surcharges, the Other Surcharge will not be applied on any item within the number of free items specified.]

To **Add a Local Charge Profile**, first click the Clear Form button to clear out any old values, then begin typing in the new Charge Profile's values. Once a Charge Profile is created, it must then be assigned to individual Patrons or Departments before it takes effect on future items. In most cases, a profile can be applied to a number of Patrons and Departments, so that when you change your charges at any point, making the changes here will cause them to apply to any Patron with that Local Charge Profile in future activity.

Make sure the new **Local Charge Profile Name is unique** (if it isn't, you'll be notified), and then add the appropriate charges as they come. If you click Ok, then that Profile will be brought back to the Patron that caused the search (but you'll only notice this if you came from the BorrowItems Grid form

If you try to create a Local Charge Profile that matches one that already exists, you'll get this message in the **Local Charge Profile Information Form**:

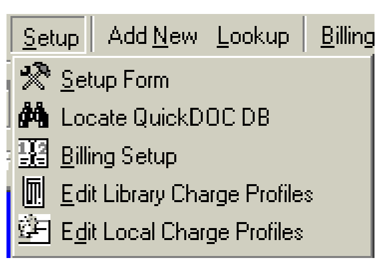


The message box will notify you of the matching Charge Profile, and you'll be asked if you want to create a duplicate under the new name. In many cases, just knowing that the profile with the charges you need is already there will be enough, and you can click No. In some cases, though, it might be appropriate to create **multiple Local Charge Profiles** with different names, even though they currently match an existing profile. The fact that both names exist gives you the option to increase the charges in one, and not the other, at some point in the future.

For example, we currently charge in-house Patrons and **Loansome Doc Patrons** $5.00 an item, but we maintain two profiles, one called 5 Default and one called Loansome Doc (not shown above) with the same values, so that we have the option to easily change one or another of the values in one step at some future time.

There may nevertheless be cases where a Patron's Local Charge Profile is applicable to that Patron or Department only. In those cases, you might just name that profile after the Patron or Dept, but don't forget to assign it in the Patron or Dept record, on the Charges Tab, as well.

You can also **edit or add a Local Charge Profile from the Setup Menu**:



Preferred Payment Method is the method by which this Patron normally prefers to pay. It reveals a dropdown Combo Box with whatever values are in the **Payment Methods** (**tblPmtMethods**) Table of QuickDOC.MDB. Since this table provides payment methods used for

Libraries as well as Patrons and Departments, some of the entries may not apply to Local Payments.

This value can also be left blank (you should see an empty value at the top of the dropdown list when it's first opened) as opposed to the usual (None) value, so long as the empty record is also present in tblPmtMethods (don't delete it by accident or design). The field name is **PatronPrefPmtMethod** and allows 30 characters.

Cost Center is Cost Center assigned to this Patron. It will be used in Invoicing and will appear on various Patron Lists. The field name is **PatronPrefPmtCostCenter** and allows 50 characters.

Acct Number will contain any local Account number for this Patron. The field name is **PatronPrefPmtAcctNumber** and allows 50 characters.

Name on Acct is only used if the name to bill is different from the Patron Name. In most cases it is left blank. The field name is **PatronPrefPmtNameOnAcct** and allows 50 characters.

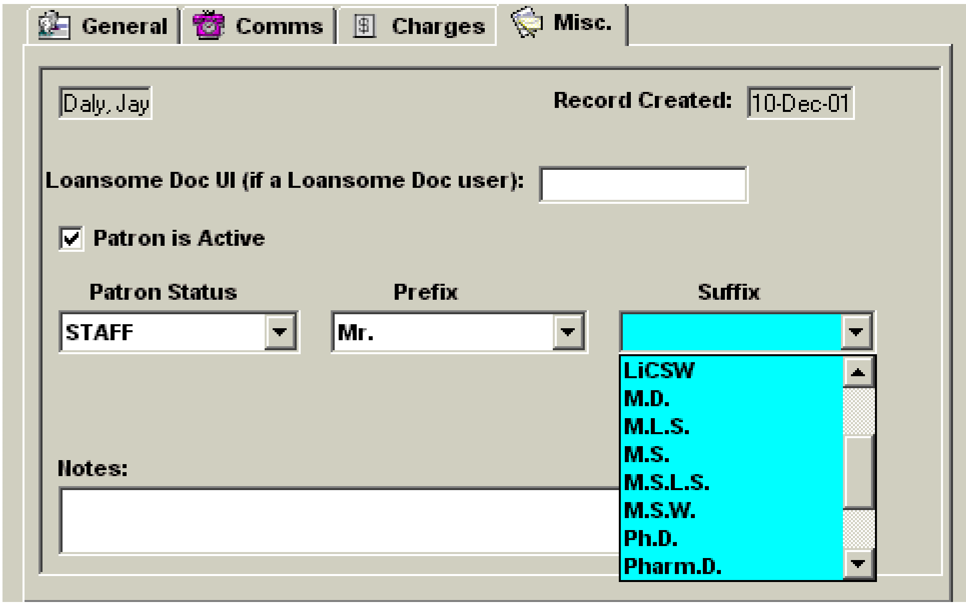
Exp Date is typically used to record **Credit Card Expiration** notices but can be used for any other **Expiry Date**. This is an alphanumeric field, not a Date field, so any value may be entered. In non-Credit Card records it is usually left blank. The field name is **PatronPrefPmtCCExpDate** and allows 20 characters.

Notes on the various values of this Tab can also be entered. The field name is **PatronPrefPmtNotes** and allows 100 characters.

The **State/Province Sales Tax** box isn't implemented yet and will have no effect.

Patron Form – Misc Tab

This Tab is used to record miscellaneous data about the Patron. The **Patron Record Created Date** is also visible on the Misc Tab.



Loansome Doc UI is the UserID assigned to this Patron if the Patron is a Loansome Doc user. This value is imported from any Loansome Doc request received on DOCLINE. This is the **PatronLDXUI** field in the Patron record and allows 30 characters.

Patron is Active checkbox can be unchecked to render a Patron inactive while still keeping the record. This is a boolean field in the Patrons Table with the field name **PatronActive**.

Patron Status contains a value identifying the Patron's Status in your institution. It reveals a dropdown Combo Box with whatever values are in the **Status** (**tblStatus**) Table of QuickDOC.MDB. Default values are included at startup; others may be added using Access 2000 (an internal edit/add form will also be added in QuickDOC at a future date). Startup values include:

Status Code	Status Full Name
AHP	Allied Health Professional
DD	Dentist
FAC	Faculty
FELLOW	Fellow
FLAG	Flagged, Suspended
GRAD	Graduate
MD	Physician
NURS	Nursing Staff
OTH	Other
RES	Researcher
STAFF	Staff
UND	Undergraduate

If you add or edit any of the Status Code values, try to keep the same format: uppercase, up to 6 characters. The StatusFullName field can be up to 50 characters. The field name in the Patrons Table is **PatronStatusCode** and allows 6 characters.

Prefix contains a prefix value for the Patron, which can be used in a Salutation field of a form letter, etc. It reveals a dropdown Combo Box with whatever values are in the **Prefixes** (**tblPrefixes**) Table of QuickDOC.MDB. Default values are included at startup; others may be added using Access 2000 (an internal edit/add form will also be added in QuickDOC at a future date). Startup values include:

Prefix Name

Dr.

Mr.

Mrs.

Ms.

Sr.

If you add or edit any of the **PrefixName** values, try to keep the same format: mixed case, up to 10 characters. The field name in the Patrons Table is **PatronPrefix** and allows 10 characters.

Suffix contains a suffix value for the Patron, which can be used on Invoices, etc. It reveals a dropdown Combo Box with whatever values are in the **Suffixes** (**tblSuffixes**) Table of QuickDOC.MDB. Default values are included at startup; others may be added using Access 2000 (an internal edit/add form will also be added in QuickDOC at a future date). Startup values include:

Suffix Name

D.D.S.

D.M.D.

DNSC

L.P.N.

LiCSW

M.D.

M.L.S.

M.S.

M.S.L.S.

M.S.W.

Ph.D.

Pharm.D.

R.D.

R.N.

R.Ph.

R.R.T.

If you add or edit any of the **SuffixName** values, try to keep the same format: mixed case, up to 10 characters. The field name in the Patrons Table is **PatronSuffix** and allows 10 characters.

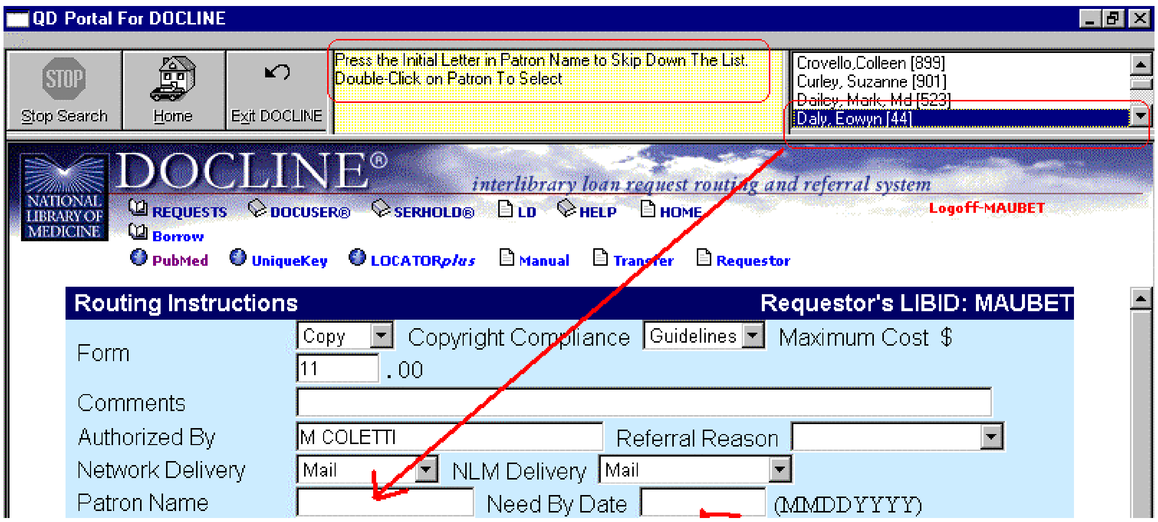
Notes on the various values of this Tab can also be entered. The field name is **PatronNotes** and allows 70 characters. The Patrons Table also has a **PatronModDate** field to track **changes made by concurrent users** so that anyone trying to make a change to a record that was changed by another user during the time it was checked out to edit by the first user will be so notified and asked to first check the revised record before making a further alteration. A

PatronCreateDate field holds the date the Patron Record was created and displays here on the Misc Tab, although it can't be edited.

Add Patrons

The Add Patrons form is the same as the Edit Patrons form. Clicking the **Clear/Reset This Record Button** on the Patron Information General Tab sets all values back to their defaults for an empty record and prepares for the creation of a new record. The values on the form are the same as if you had arrived here by clicking the Add Record button on the Patrons List.

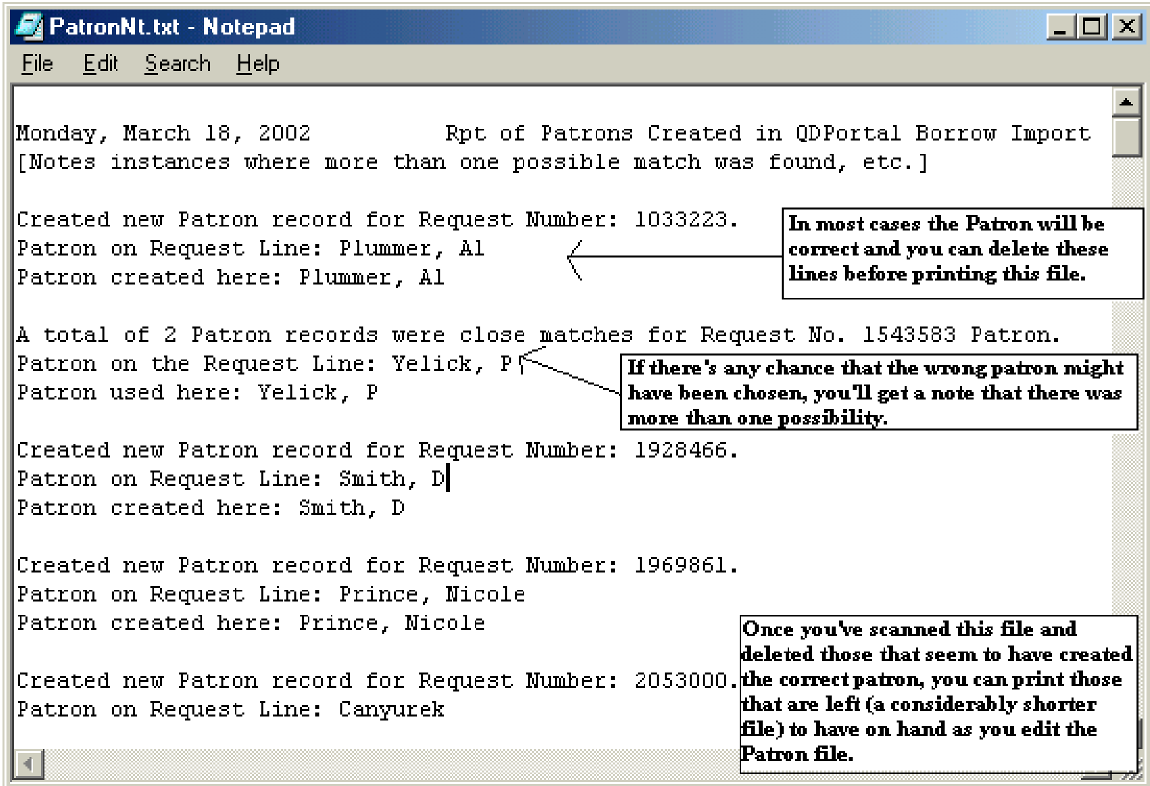
New Patrons are added automatically from QDPortal Imports if the Patron Field doesn't contain the current Patron Number in brackets at the end of the field.



If you were to type in a new Patron Name, above, instead of using the Patrons List, that new patron record would be added during the course of importing this item from QDPortal saved records. A note that the patron has been added can be printed at the end of the session, but it is usually better not to print the report when you have many new Patron records. In that case just answer No to the Print questions and look at the file later in Notepad.

If there are only one or two patrons added during the session, then it's easy enough to print the report itself rather than to open it in Notepad.

To open the file, for editing and printing in Notepad, use Windows Explorer to find the file C:\QDBorrow**PatronNt.txt** on the machine that saved the item. Double-click the file's icon and it will open in either Notepad or WordPad.

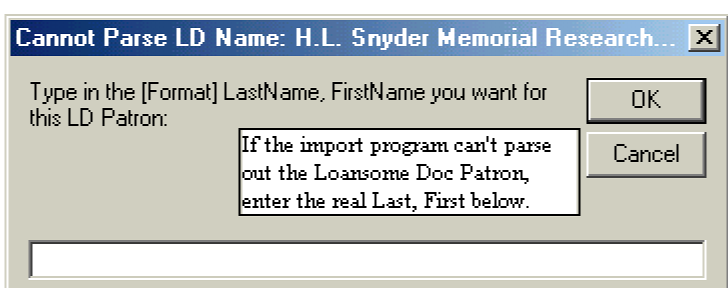


Use the file to double-check new entries in the Patron Information File.

Loansome Doc Patrons

Loansome Doc Patrons are added in much the same way as regular Patrons. Since the Loansome Doc Patron comes in without a [Patron Number] in ALL cases, but will include a **Loansome Doc Patron UserID** field, we can use that field to look up the Patron by LDX UI in the same way we assign items to regular Patrons by using the Patron Number found in brackets at the end of the DOCLINE Patron name field.

In cases where that UserID isn't yet in the file, a new record will also be made. Since Loansome Doc Patrons can type in their names any way they please, we can't always be sure what the format may be, especially when the **LDX Patron isn't an actual person**. Consider the case of the H.L. Snyder Memorial Research Foundation, located in Winfield, KS. When QuickDOC tries to parse out the name of this Loansome Doc Patron it's not going to do very well. Consequently, if it finds that it can't easily parse out a Loansome Doc Patron name, it will display an Input Box and leave the decision up to you:



To achieve the best result in this kind of situation, first envision how you want the result to be displayed and sorted. In most reports and bills, the final format will be First Middle Last, Suffix (if any); sorting is always by Last Name. With that in mind, we want bills or reports to go to H.L

Snyder Memorial Research Foundation, and we would prefer to have this “patron” sort under Snyder. To achieve that result enter:

Snyder Memorial Research Foundation, H.L.

in the input box. QuickDOC will look for the comma and treat everything before it as the Last name. It will treat everything after the comma as a First Name. This should produce the desired result.

In cases where the desired result is something other than what QuickDOC gives you, just edit the field on the Patron Information Form, keeping in mind the formats for reports and bills, as well as sorting. Since any activity for this Loansome Doc patron in the future will be assigned to the patron record through the UserID match, it won’t matter what the actual name field says, and your choice of Last Name, First Name will be used in all future activity.

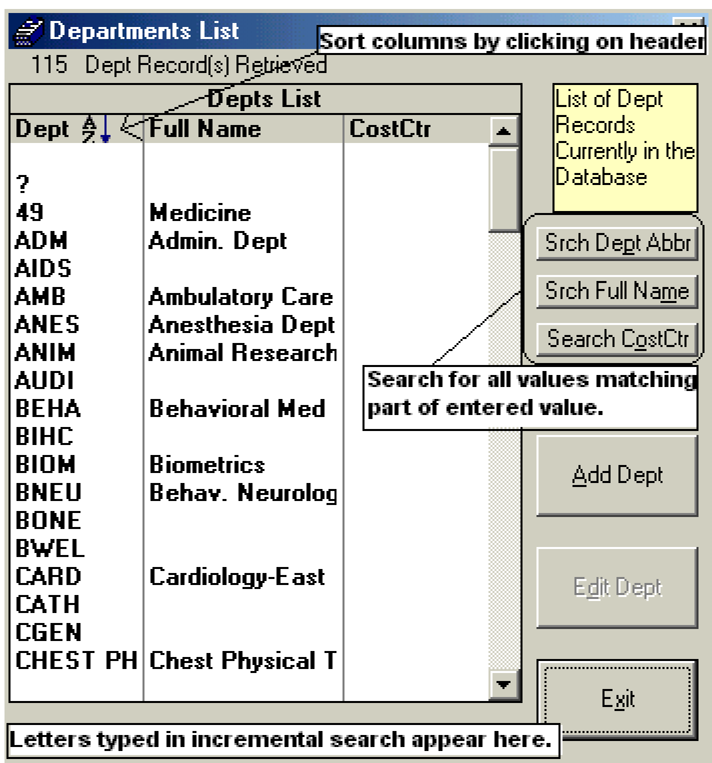
Departments

Records for Departments are held in the QuickDOC.MDB database primarily in the **tblDepts** Table, with associated records in **tblDComms**, **tblPDCharges**, **tblDeptPrefPmts**,and **tblPDAddrs** Lists of Department records are available in a column on all Borrow Grids, as well as through the Depts List.

The Depts List

Displaying Departments

Records for Department are primarily accessed through the **Depts List** (listed under "**Lookup**" on the **Menu Bar** as well as Add New). The Depts List also pops up in other places, such as when you're adding a new Borrowed Item, or when searching by Department in the Local Billing Grid, so that the Department can be chosen from the list.



The list shows the Departments in your file alphabetically **by Dept Abbreviation**, which is the default sort order. Start typing the first few letters of the Abbreviation to jump ahead on the list, or use either the Down Arrow key or the Page Down key or the scroll bar at the right of the list to navigate further. (the **None Record**, by the way, is a place saver for No Department, and can be used in records where the Department name is unimportant, or when you want to delete a Department record while the Department you want to delete still has backfile activity in the database. The horizontal scroll bar at the bottom will expose the Cost Center column of the list if you drag it to the right. If you hold the cursor over any entry that is wider than the column width, a tool tip will appear with the full name visible.

As an item is selected (either by clicking on that line or by pressing Enter after moving down the list until the Department you want is highlighted), the **Edit Dept Button** is enabled (to switch from Edit Dept to Add Dept, click '**Clear Choice**'; the List will then be set to the topmost entry and the **Add Dept Button** will be enabled).

Searching for a Department

You can search the Depts List for specific matching entries by clicking on one of the search buttons. You can search the Dept Abbreviation column, the Dept Full Name column, and the Cost Center column. When you click the appropriate button, an input box will pop up. Enter any amount of characters you want matched and the list will then display only those records where that matching group of characters appears anywhere in the field.

To choose or edit a Department, click on the line that contains the entry you want: the '**Edit Dept' Button** will be enabled and that Department will be your current choice.

To **reset the Depts List** after a search to its full number of entries, click once on any item in the list to highlight it, and then either click the Clear button or click the header at the top of the Last column to start the sort on that column.

Sorting the Depts List

You can sort the Abbreviation, Full Name or Cost Center columns in ascending or descending order by clicking on the header at the top of the column.

Deleting Departments

Click the Edit Dept button to bring up the complete Department Information Form, and then click the **Delete Dept button** on the lower right of the General Tab.

Editing Departments

Click the Edit Dept button to bring up the **Department Information Form**. . Double-clicking a line is the equivalent of selecting it and clicking the Edit Dept Button, and will also open the Department Information Form.

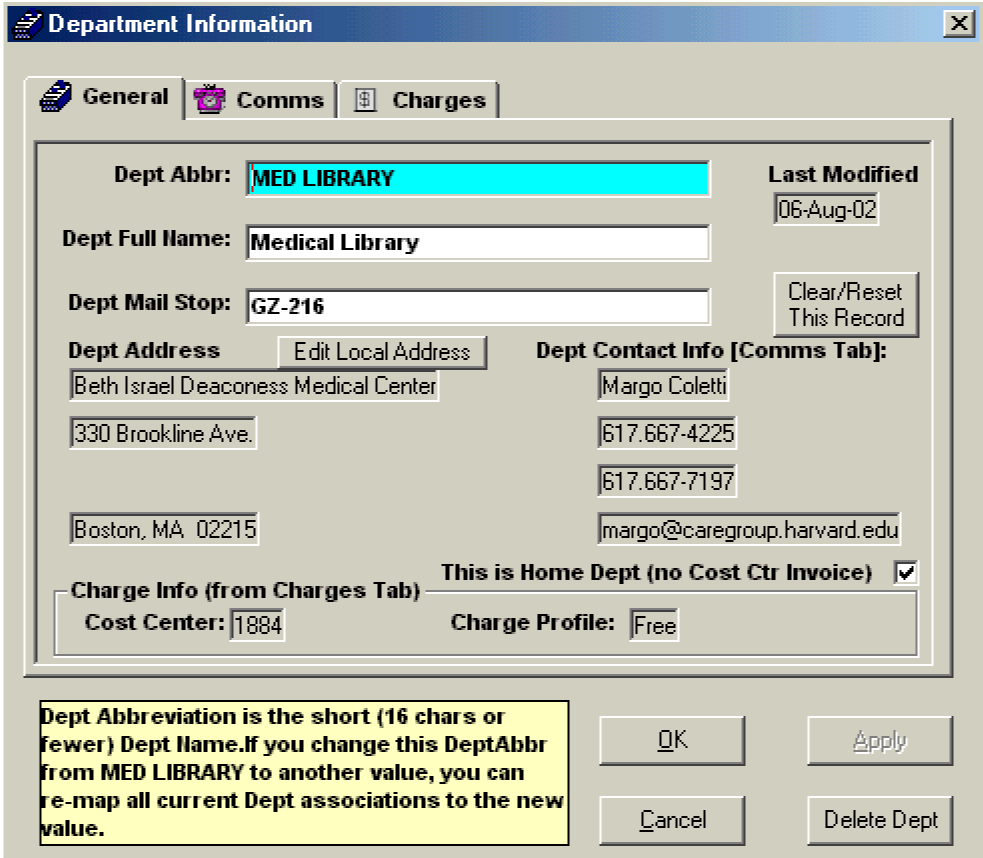
Department Information Form

The Department Information Form consists of five tabbed forms, located by clicking on the Tabs at the top of the form or by pressing Enter (or the Down Arrow) in the last control on the previous form, except on the Misc Tab, which is the last Tab visible. Pressing an Up Arrow from the topmost control of any form except the General Tab will move back to the previous Tab.

Department Information Form – General Tab

The General Tab presents general Department information, along with a snapshot of values set on other Tabs, including Local Address information; phone, fax and email data; Cost Center and Local Charge Profile.

The **Dept Abbr** field is the abbreviated name for this Department. There are sixteen characters available but, in general, shorter is better, because these also take up space in the Patron Name field on DOCLINE, where space is limited (40 characters). The **Dept Full Name** field is full Department Name and will be printed on most reports, etc. There are 50 characters available for this field. The **Dept Mail Stop** field is for local mailing address, usually a **Room Number** or **PO Box**.



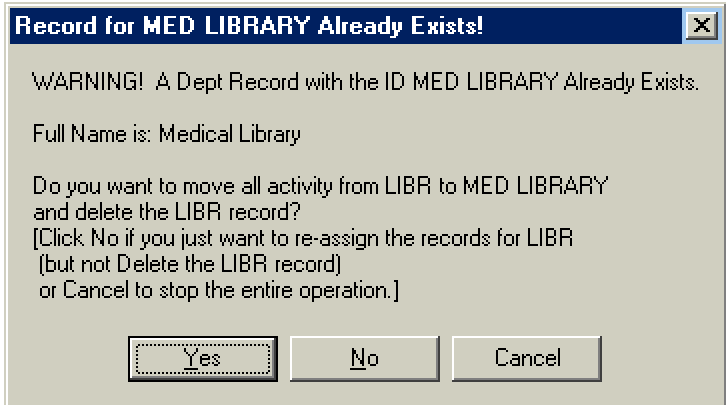
The **Home Dept** checkbox indicates that this record is the Department record for the Library, itself. It will cause the **Cost Center Charges Report** to exclude records with this Department value when composing that report.

The remainder of this Tab shows current values from other Tabs (to permit one-stop lookup of common values; if you want to make a change to one or more of these values, move to the Tab specified) plus various command buttons for performing certain functions or accessing the Local Addresses form.

Transfer Department Activity

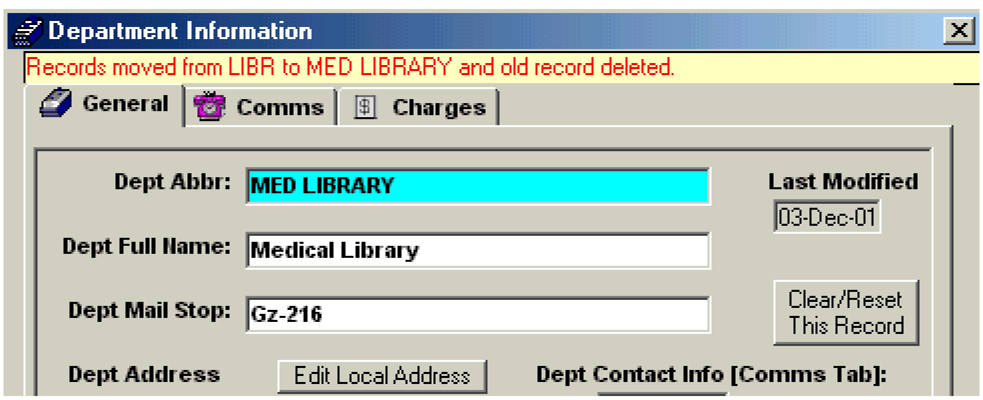
This is a quick way to **Merge Dept Records**. To transfer activity from one Department record to another, use the following steps:

1. Compare the old Department record to the new, adding any unique data from the old record to the new record on the appropriate Tab.
2. Edit the old record, changing the Dept Abbr field to match the new code and pressing Enter.
3. A message box will appear (as illustrated here for a transfer from Department LIBR to Department MED LIBRARY):



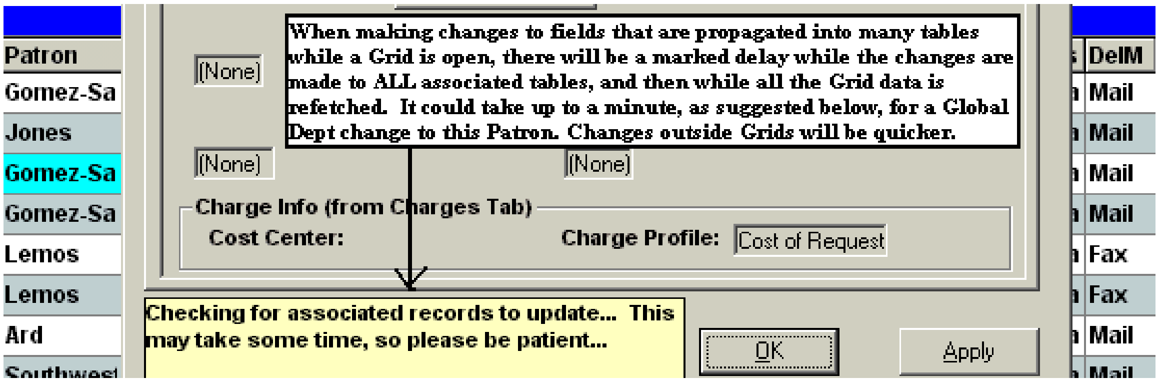
4. Click **Yes** if you want to move all activity in the database now assigned to LIBR to the MED LIBRARY record and delete the LIBR record.
5. Click **No** if you want to move all activity in the database now assigned to LIBR to the MED LIBRARY record but keep the LIBR record for future use.
6. Click **Cancel** to back out of the entire deal.

If you choose either 4 or 5, above, all the activity assigned to LIBR in any table within QuickDOC.MDB will be assigned to MED LIBRARY. This is a quick way to **Merge Department Records**.



Editing Departments From a Borrow Grid

When you come to the Department Information form by clicking the **To Depts button** on a Borrow Grid, you can make Dept Abbr changes, along with changes to any other fields in the Department record. When you make changes to the first field, however, that change must be cascaded through many other **associated tables** in QuickDOC.MDB. And when this cascading occurs while a Grid is displaying data, the Grid must be closed, the changes made (if any), and the Grid re-fetched and re-displayed. Since this may take some time, you'll see a message displayed while the Edit form remains visible:



Since the wait can seem interminable while you're itching to get on with more changes, it makes sense to make any extensive changes to the Abbr field using the Depts List rather than the To Depts button on a Borrow Grid. But if you do make changes from the Grid, just be patient: the hourglass really will go away, eventually.

Clear/Reset Dept Record

Clicking the **Clear/Reset This Record Button** on the Department Information General Tab sets all values back to their defaults for an empty record and prepares for the creation of a new record. The values on the form are the same as if you had arrived here by clicking the Add Record button on the Depts List.

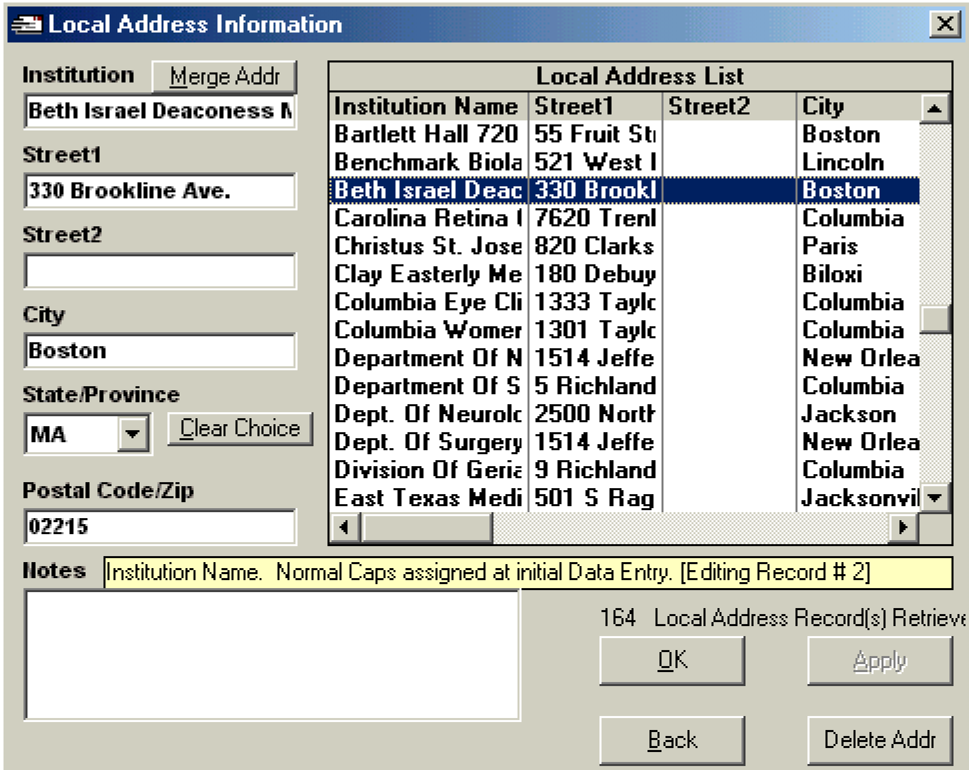
Local Addresses Form

The Local Addresses form is available from either the Patron Information form or the Department Information form by clicking the **Edit Local Address button**. Because addresses for Patrons and Departments are often identical, it makes sense to save this information once and assign it to individual Patrons or Departments rather than repeat it for each Patron or Department record.

This information is stored in **tblPDAddr** in QuickDOC.MDB and can be added to or edited by clicking the Edit Local Address button on the General Tab of either the Patron or Department Information forms.

Each **local address record** is given a unique record number in the **PDAddr Table** (the record number for **Institution Name (Address)**: Beth Israel Deaconess; and **Street1 (Address)**: 330 Brookline Ave.; is 2, in the sample below), and that record number (field **PDAddrID** in the PDAddr Table) is then assigned, if selected, to Patron and Department records when choosing the Local Address from the combo box (it's held in the **PatronAddrID** or **DeptAddrID** field of the appropriate table).

Anytime an address is needed for a Patron or Department, a lookup is made in tblPDAddr for the values in the record number of the appropriate AddrID field. The **Local Address Information** Form looks like this:



Institution Name: This will be the General Institution in most cases but may also be an alias or internal moniker. It may be a completely different **institution for Loansome Doc Patrons**. It may also be blank, which may signify no local institution or the default local institution or just a missing value. You can see that the potential for duplicates here is fairly strong. The **MergeAddr button** will be useful to bring these duplicate (or redundant) addresses together. The field name is **PDAddrInstName** and allows 60 characters.

Deleting a Local Dept Address

To delete a Local Address, click on it on the list, to move the values into the edit boxes, and then click **Delete Addr**. If the address hasn't been assigned to any Patron or Department, then the delete will be performed. If it is assigned to any Patron or Department, you'll get a message box:

Reassign any Patron or Dept records and try deleting again.

Automatic Capitalization

In most cases, when you are entering information into a new field (no previous data value), QuickDOC will try to capitalize entries based on a rule. Usually it's the first letter capitalized for each word, but the Help box that displays when the field is entered will usually let you know what kind of capitalization or formatting will be applied to any entries in that field.

Whenever (as above) the help box says something like "**Normal Caps assigned at initial Data Entry**" it means that QuickDOC will try to assign **automatic capitalization** based on the initial letters of words typed into that field. In the Institution Name field above, if you were creating the record, you could type "beth israel deaconess medical center" into the Institution box and, after you pressed Enter or Tab or clicked on another box, the entry would re-assemble itself and print out in the box as "Beth Israel Deaconess Medical Center," with the first letters of each word in **uppercase**, which happens to be as it should be.

But what if you wanted an institution named "BIDMC Medical Center?" If you type "bidmc medical center" into the Institution box and press Enter, you'll see "Bidmc Medical Center" after pressing Enter, which is close but not exactly what you wanted to enter. Unfortunately, even if you type "BIDMC Medical Center" in most of these fields, it will first re-set to **lowercase** characters and then apply the capitalization to the first letters, with a result exactly like the first.

If you're worried about the capitalization that might be applied, enter the value in its proper format and press Enter. Any format/capitalization changes will be applied and displayed immediately. If they are not to your liking, press the UpArrow key or Shift-Tab or just click back into the field you're not satisfied with and re-type the correct field values, just as you want them to be displayed. In the case above, manually change the "idmc" in the field to "IDMC" and press Enter. Once the field has an actual value, entries are no longer vetted for capitalization and are assumed to be edits.

The general rule is that, for **initial entries into empty fields**, QuickDOC tries to add the proper **capitalization**, so that you don't need to think about Shift Keys while entering information. But if this should result in a bad capitalization format (like Bidmc or Nih), just register the change (by pressing Enter or Tab or clicking on another box) and then click back (or press Shift-Tab) into the box where the change needs to be made to correct the format (change idmc to IDMC or ih to IH), and then Enter (or Tab or anything to exit that box) so that the change can be registered. (Box should now read BIDMC Medical Center or NIH or whatever.)

Street1 is the first line street value of the address. **DON'T** use the **Mail Stop** value (usually Room Number or local PO Box) since this is held in individual Patron or Department records. The field name is **PDAddrStreet1** and allows 60 characters.

Street2 is the second line street value of the address. **DON'T** use the **Mail Stop** value (usually Room Number or local PO Box) since this is held in individual Patron or Department records. The field name is **PDAddrStreet2** and allows 60 characters.

City is the city of the address. The field name is **PDAddrCity** and allows 60 characters.

State/Province is the State or Province of this Address Record. It's selected from the dropdown list of StateProvs. To be eligible for entry in the State/Prov field of any QuickDOC Table, the entry must already exist in **tblStateProvs**, the State/Provs Table in QuickDOC.MDB. If your entry isn't in the dropdown box, first edit (or add to) the StateProvs Table and then start up QuickDOC again; the new values should be in the dropdown box. The field name is **PDAddrStateProv** and allows 6 characters.

Postal Code/Zip is the Postal Code of the address. The field name is **PDAddrPostalCode** and allows 20 characters.

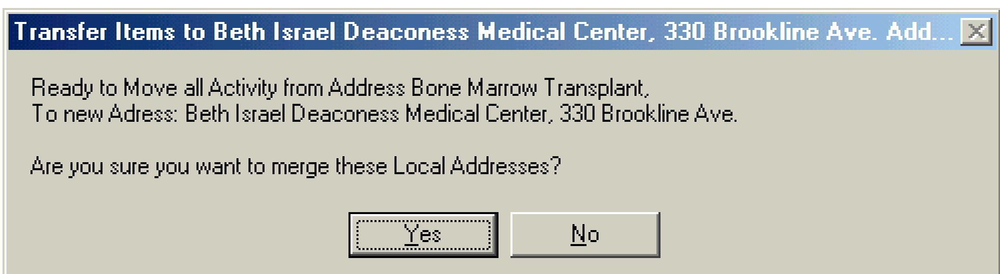
Notes on the address record can also be entered. The field name is **PDNote** and allows 50 characters.

Unique records in the PDAddr Table are identified by the combination of the Institution, Street1 and Street2 fields. Because the matching value might be in either Street1 or Street2 for a specified Institution value, both are searched when looking for duplicates. Nevertheless it will be common to see duplicate records, especially when one or another of these three values have been left blank. It is therefore expected that the Merge Addr button will be used, from time to time, to reconcile these near duplicates.

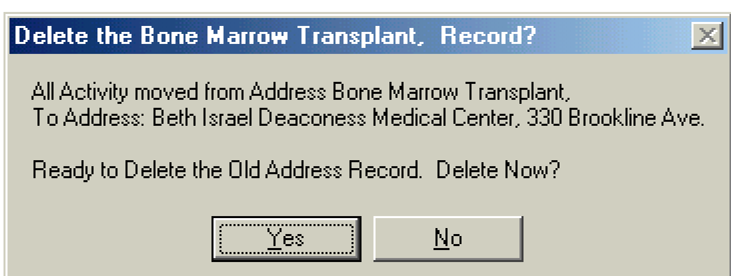
Merge Address Records

This is a quick way to **Merge Duplicate Address Records**. Any Patrons or Departments using the old record number will be switched to the new. Use the following steps:

1. Compare the old Local Address record to the new, adding any unique data from the old record to the new record.
2. Bring up the old record by clicking on it in the **Local Address List**, and click the **Merge Addr button**.
3. You'll then be instructed to choose (again from the Local Address List) the record you want to <u>transfer activity **to**</u>.
4. When you click the row for the new address record, a message box will appear so that you can confirm your choice:



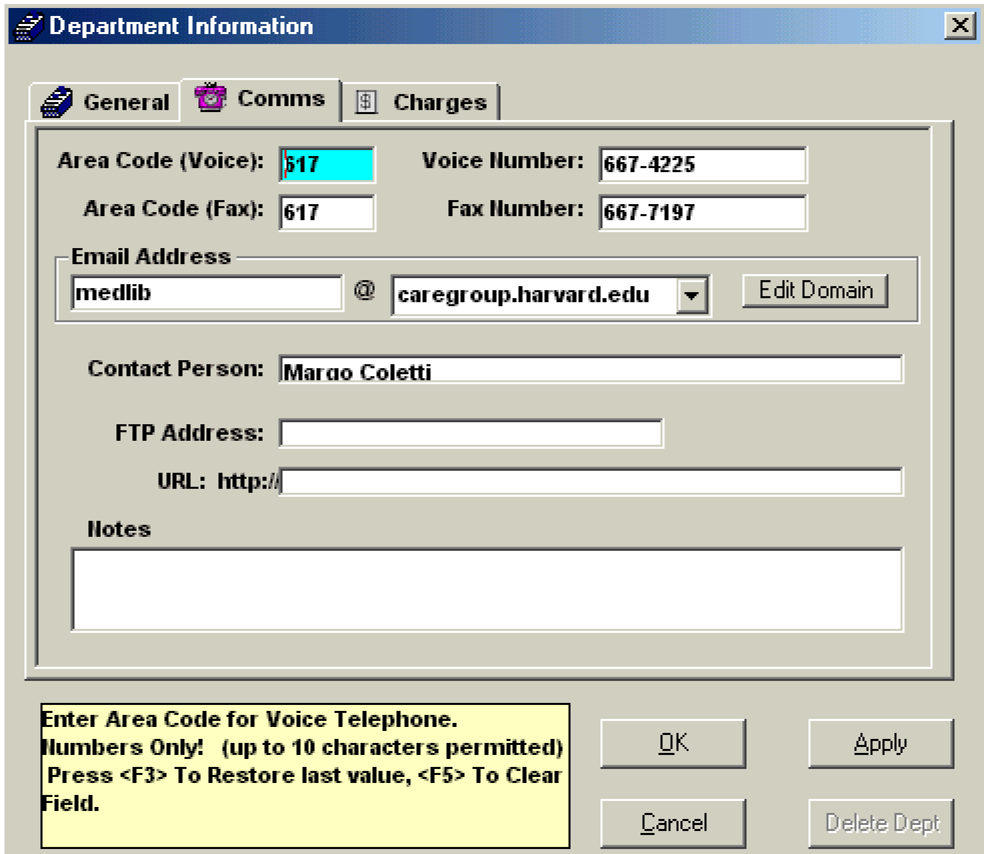
5. Click **Yes** if you want to move all Patrons or Departments now assigned to the old address (Bone Marrow Transplant, in this case) to the new address (Beth Israel Deaconess).
6. Click **No** to back out of the entire deal.
7. If you click Yes, all Patron or Department records with the old Local Address ID will be assigned the new Local Address ID number. You'll next be asked if you want to delete the old record:



8. Click **Yes** to delete the old record (the usual choice) or No if you want to keep it around for some reason.

Department Information Form – Comms Tab

The Comms Tab has local communications information. Some of this information may have been imported from the old DOS QuickDOC FULLDEPT file, if it was available.



This information is stored in **tblDComms** in QuickDOC.MDB and is associated with the main Depts Table with a matching ID Number (it matches the Dept Abbr). The field name is **DCommID** and allows 16 characters.

Area Code (Voice) is telephone Area Code. The field name is **DCommAreaVoice** and allows 10 characters.

Voice Number is rest of the Voice number, including any extension. The field name is **DCommVoiceNumber** and allows 20 characters.

Area Code (Fax) is fax Area Code. The field name is **DCommAreaFax** and allows 10 characters.

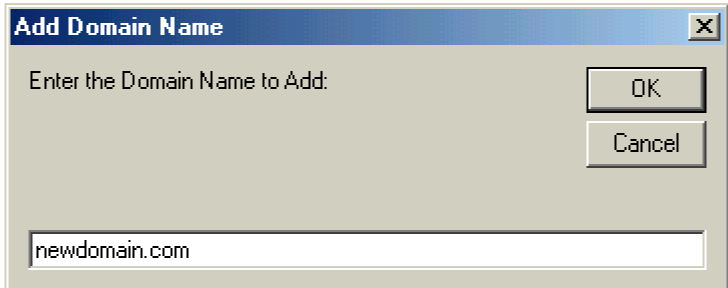
Fax Number is rest of the fax number, including any extension. The field name is **DCommFaxNumber** and allows 20 characters.

Email Address comprises two boxes. The first, a text box, is for the name part of the Department's email address (the part before the @ sign). The field name for this part is **DCommEmailAddr** and allows 50 characters. The second box is a combo box that reveals a dropdown list of **local domain names** used by known Patron or Department email addresses. This list is stored in the **Local Domains** (**tblLocalDomains**) Table of QuickDOC.MDB. To conserve space, each Domain Name in tblLocalDomains is identified by a number in the **LocalDomainNumber** field, and it is this number that actually resides in the Patron or Department record. The actual name is stored in the **LocalDomainName** field of tblLocalDomains, and it is the list of names derived from this table that appears in the dropdown combo box. (None) is the default record and will appear if a Local Email Address is unknown. The field name in the tblDComms record is **DCommLocalDomain** and is a number field reflecting the LocalDomainNumber in tblLocalDomains.

If the current domain name is the (None) record, you can either add a correct domain name from the dropdown list or, if the correct Local Domain isn't on the list, click the **Add Domain button** to add it (this button will read **Edit Domain** if a value other than (None) is in the Domain Name box).

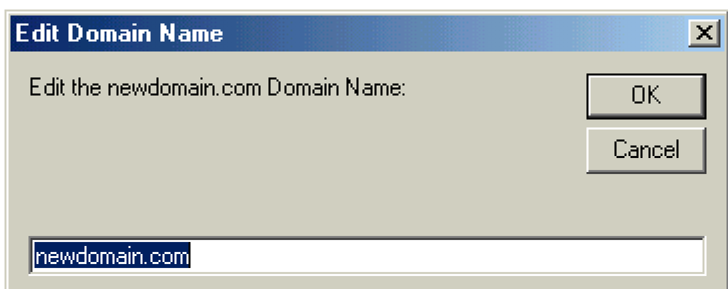
Adding a Domain Name

To add a new domain name to tblLocalDomains (and to the dropdown combo box), click the Add Domain button when the current value is (None). You'll see the **Add Domain Name Input Box**:



Simply enter the new domain name in the input box and press Enter or click Ok. The new domain name will be added to the Local Domains Table and appear also in the current dropdown combo.

The command button will change to Edit Domain, which allows for editing of a domain name.



Any changes made to a Domain Name entry will of course be reflected in all Patrons or Departments with email addresses matching that domain. This is a fairly easy way to make those dreaded email address changes post-merger, from oldhospital.com to newhospital.com, so long as everyone is included in the change. If some will keep the old domain, then you'll either have to create a new domain name and individually assign each changing Patron or Department to it or do the edit to the new name and then create the old name again and assign each non-changing Patron or Department back to it. Not an enchanting proposition either way, but you can choose whichever method yields the fewest individual edits.

Contact Person is the name of the Department Contact. The field name is **DCommContact** and allows 50 characters.

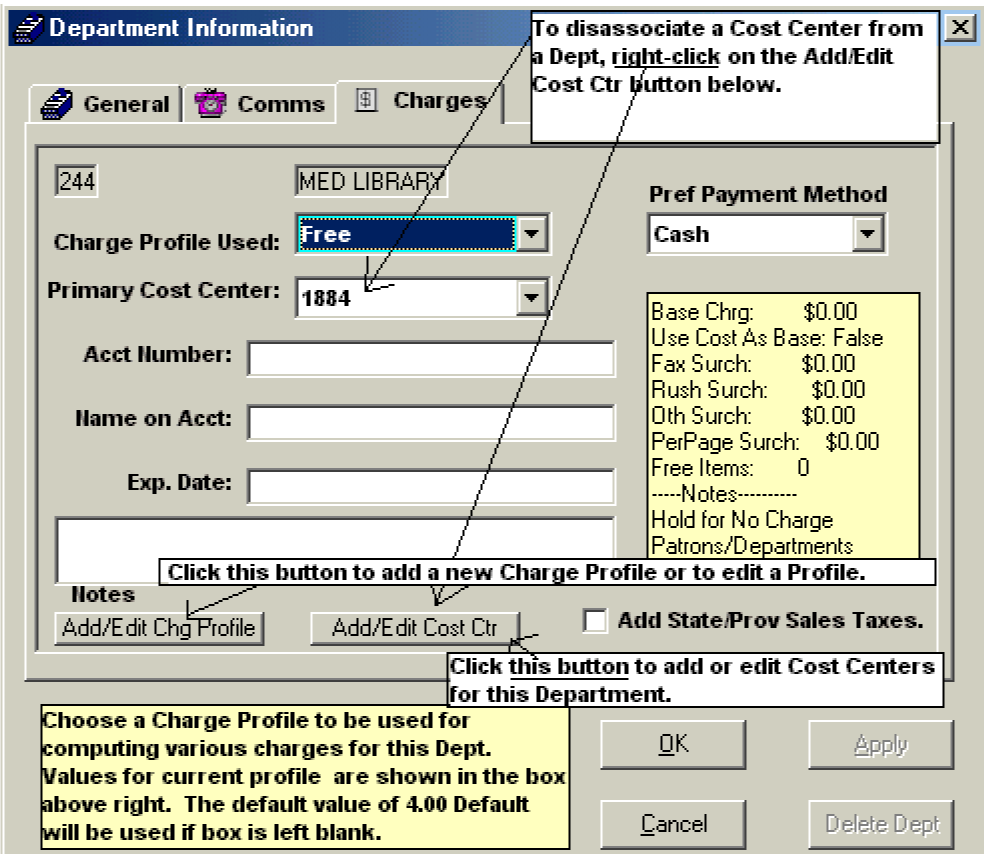
FTP Address is for any Department that participates in delivery of documents via FTP (or Ariel, for that matter, which is a variety of FTP). This may not apply to many Departments at this point, but could change in the future. The field name is **DCommFTPAddr** and allows 50 characters.

URL: http// is for adding a web site for any Department that may support this method of communication. The field name is **DCommHTTPAddr** and allows 250 characters.

Notes on the various values of this Tab can also be entered. The field name is **DCommNotes** and allows 100 characters. The DComms Table also has a **DCommTimeStamp** field to track **changes made by concurrent users** so that anyone trying to make a change to a record that was changed by another user during the time it was checked out to edit by the first user will be so notified and asked to first check the revised record before making a further alteration.

Department Form – Charges Tab

The Charges Tab contains information about charges and payment options. Charge Profiles determine the default charge that is applied when an item is received and is filed with the BorrowItem record in the associated **tblBorrLocals** record's **BorrLocalCHRGAsDept** field (there is also a matching **BorrLocalCHRGAsPatron** field that will be used if the Invoice or Payment is ultimately made using a Patron Invoice or Payment). While this default can always be changed in individual items, having the default charge be as accurate as possible can save a great deal of editing later on.



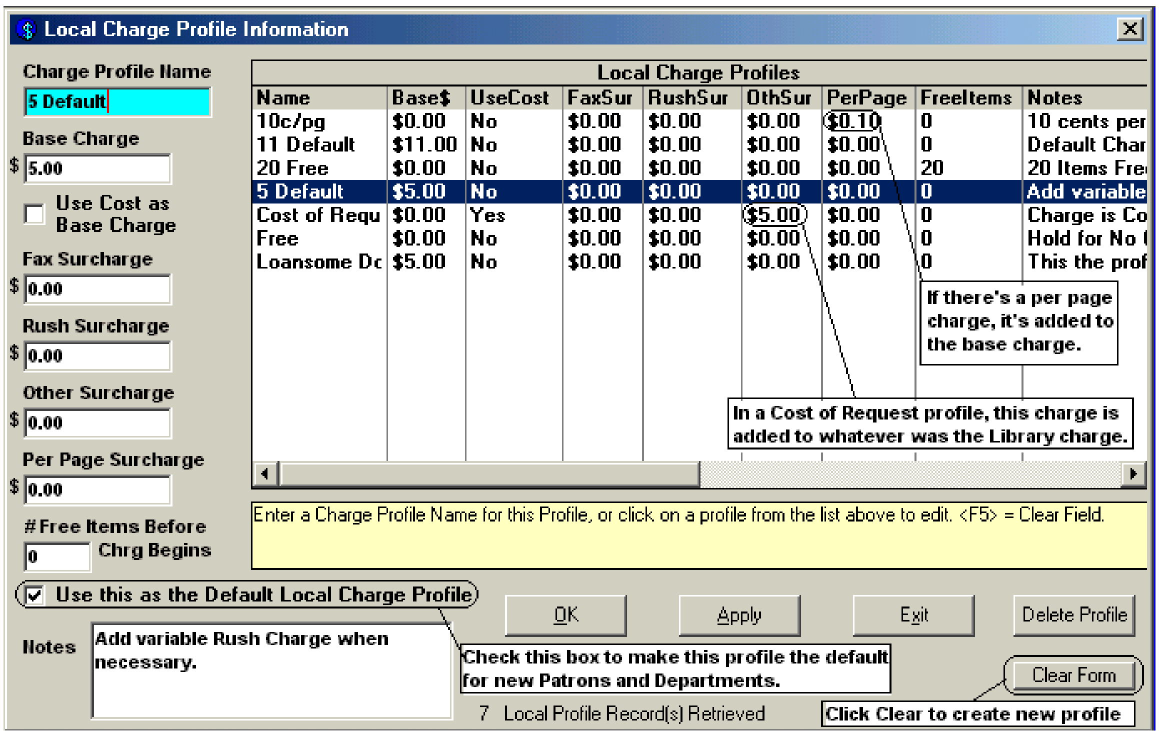
This information is stored in **tblDeptPrefPmts** in QuickDOC.MDB and is associated with the main Depts Table with a matching ID (it matches the Dept Abbr). The matching field name is **DeptPrefPmtDeptRec**. There is also an unrelated unique key field, **DeptPrefPmtID**, which will allow for multiple Department Preferred Payment records at some later date. This ID, which identifies this record in the **DeptPrefPmts** (**tblDeptPrefPmts**) Table of QuickDOC.MDB, is visible in a recessed box at the upper left of the Charges Tab. It is 57 in the case shown above.

The **Primary Cost Center** field contains the main Cost Center used by this Department. Additional Cost Centers can be added using the **Add/Edit Cost Ctr button**, to bring up the **Add/Edit Cost Center Form**. Values other than the Primary value will appear in the Dropdown box.

Charge Profile Used is a combo box used to select Charge Profile to be assigned to this Department. Charge Profiles for both Patrons and Departments are held in the **PDCharges** (**tblPDCharges**) Table in QuickDOC.MDB. In the Department record, this value is stored in the Depts Table, rather than in the DeptPrefPmts Table, in the field DeptChargeProfile. Charge Profiles must be assigned to each Department (they will otherwise be assigned the Default) and are filed with the Department record. The **DeptChargeProfile** field can be up to 20 characters and must match a value in tblPDCharges.

To **edit or add a Local Charge Profile from the Department Information form**, click the **Add/Edit Chg Profile button** to bring up the **Local Charge Profile Information** form.

Local Charge Profile Information Form



Local Charge Profiles can be named in any fashion that makes the most sense locally. In the case above, the name “5 Default” is used to suggest a $5.00 default charge for Patrons and Departments. The **Use this as the Default Local Charge Profile** checkbox is checked, which indicates that this profile will be applied to any newly created Patrons or Departments.

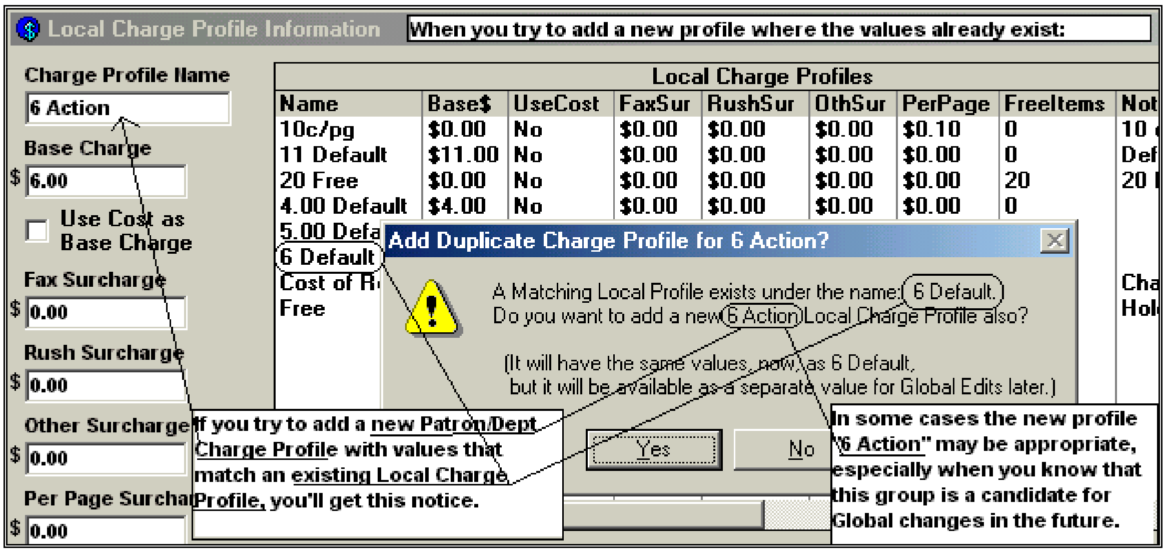
To change the default, just bring up another profile and check the checkbox on that one. Since there can only be one default at a time, checking the box on one profile effectively unchecks it for all the others.

If we were to change the Base Charge in the “20 Free” profile to $10.00, we would create a profile where the first 20 items are provided free to those with this profile, while any after that are charged at the chosen Default rates: $10 **Base Charge**; No in answer to **Use Cost As Base**; a **Fax Surcharge** of $0.00; a **Rush Surcharge** of $0.00; an **Other Surcharge** (which is added to each item) of $0.00; a **Per Page Surcharge** of $0.00; and 20 in the **Free Items Before Charge Begins** field. QuickDOC computes the **Free Items Before Charge Begins** on the fly, adding the base charge only after the free items total has been reached (currently set on a Calendar Year basis, but a Fiscal Year setting will be forthcoming).

To **Add a Local Charge Profile**, first click the Clear Form button to clear out any old values, then begin typing in the new Charge Profile's values. Once a Charge Profile is created, it must then be assigned to individual Patrons or Departments before it takes effect on future items. In most cases, a profile can be applied to a number of Patrons and Departments, so that when you change your charges at any point, making the changes here will cause them to apply to any Department with that Local Charge Profile in future activity.

Make sure the new **Local Charge Profile Name is unique** (if it isn't, you'll be notified), and then add the appropriate charges as they come. If you click Ok, then that Profile will be brought back to the Dept that caused the search (but you'll only notice this if you came from the BorrowItems Grid form

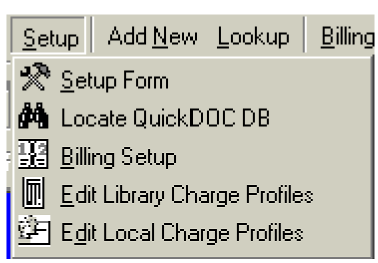
If you try to create a Local Charge Profile that matches one that already exists, you'll get this message in the Local Charge Profile Inf Form:



The message box will notify you of the matching Charge Profile, and you'll be asked if you want to create a duplicate under the new name. In many cases, just knowing that the profile with the charges you need is already there will be enough, and you can click No. In some cases, though, it might be appropriate to create a new Local Charge Profile with a new name, even though it currently matches an existing profile. The fact that both names exist gives you the option to increase the charges in one, and not the other, at some point in the future.

There may nevertheless be cases where a Department's Local Charge Profile is applicable to that Department only. In those cases, you might just name that profile after the Department, but don't forget to assign it in the Department record, on the Charges Tab, as well.

You can also **edit or add a Local Charge Profile from the Setup Menu**:



Preferred Payment Method is the method by which this Department normally prefers to pay. It reveals a dropdown Combo Box with whatever values are in the **Payment Methods**

(**tblPmtMethods**) Table of QuickDOC.MDB. Since this table provides payment methods used for Libraries as well as Patrons and Departments, some of the entries may not apply to Local Payments.

This value can also be left blank (you should see an empty value at the top of the dropdown list when it's first opened) as opposed to the usual (None) value, so long as the empty record is also present in tblPmtMethods (don't delete it by accident or design). The field name is **DeptPrefPmtMethod** and allows 30 characters.

Cost Center is Cost Center assigned to this Department. It will be used in Invoicing and will appear on various Department Lists. The field name is **DeptPrefPmtCostCenter** and allows 50 characters.

Acct Number will contain any local Account number for this Department. The field name is **DeptPrefPmtAcctNumber** and allows 50 characters.

Name on Acct is only used if the name to bill is different from the Full Dept Name. In most cases it is left blank. The field name is **DeptPrefPmtNameOnAcct** and allows 50 characters.

Exp Date is typically used to record **Credit Card Expiration** notices but can be used for any other **Expiry Date**. This is an alphanumeric field, not a Date field, so any value may be entered. In non-Credit Card records it is usually left blank. The field name is **DeptPrefPmtCCExpDate** and allows 20 characters.

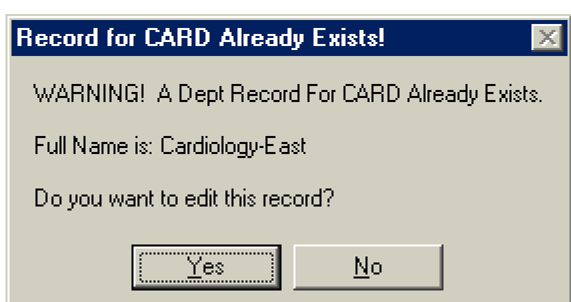
Notes on the various values of this Tab can also be entered. The field name is **DeptPrefPmtNotes** and allows 100 characters.

The **State/Province Sales Tax** box isn't implemented yet and will have no effect.

Add Departments

The Add Departments form is the same as the Edit Departments form. Clicking the **Clear/Reset This Record Button** on the Department Information General Tab sets all values back to their defaults for an empty record and prepares for the creation of a new record. The values on the form are the same as if you had arrived here by clicking the Add Record button on the Depts List.

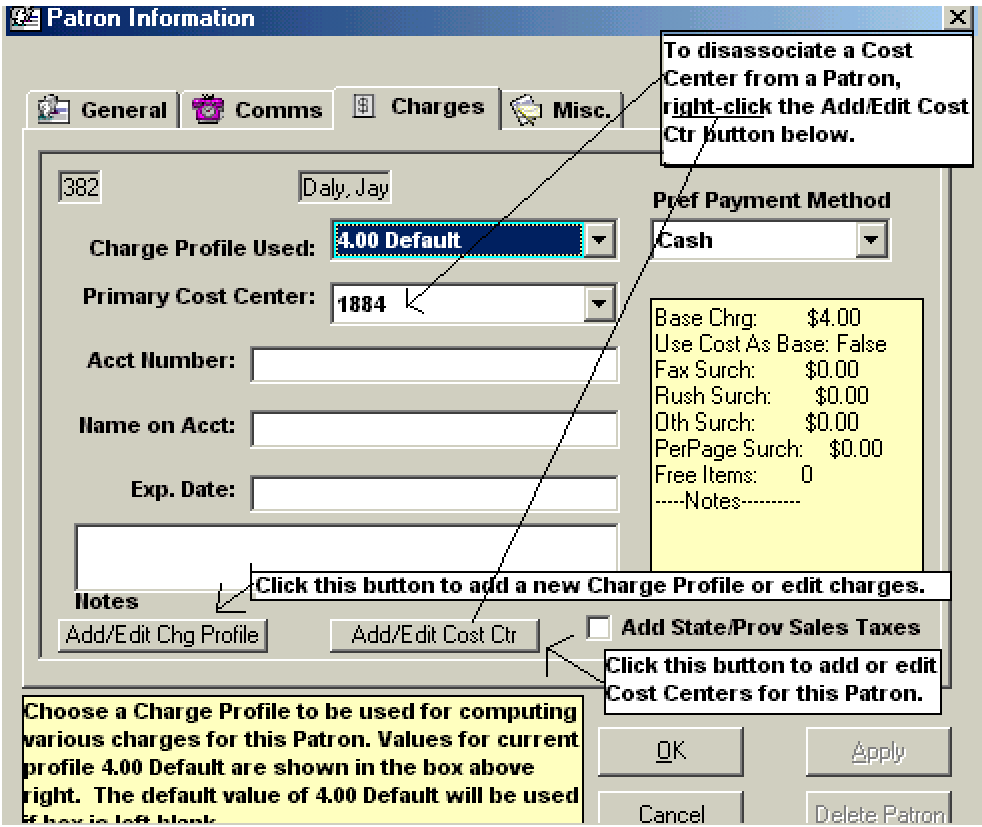
If you try to add a Dept Abbr that already exists, you'll be warned that this is the case and asked whether you want to edit that record instead.



If you click Yes you'll be editing the Cardiology – East record, rather than adding a new one.

Cost Centers

Records for **Local Cost Centers** (Patron/Dept) are held in the QuickDOC.MDB database primarily in the **tblCostCenters** Table, with associated tables tracking which cost centers are assigned to Patrons or Departments in **tblDepCostCenters**and **tblPatCostCenters**. Access to the Add/Edit Cost Centers Form is available from the Charges Tab on both the Patron and Department Information forms. Here's the Charges Tab on the Patron Information Form:



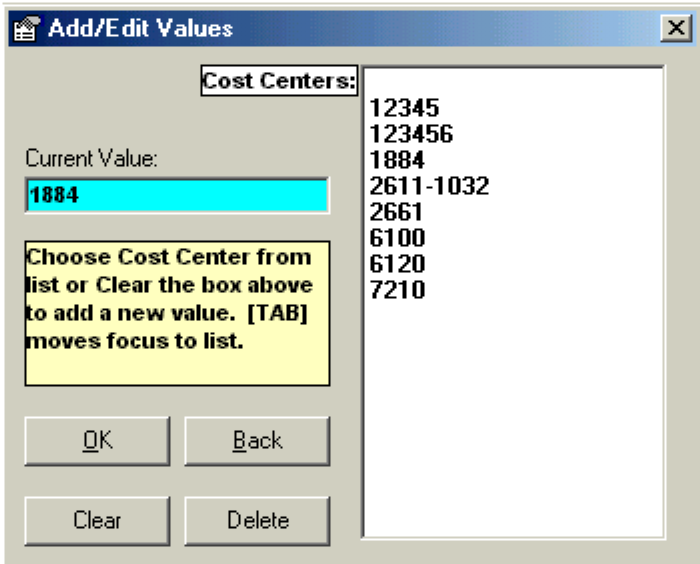
The **Primary Cost Center** will appear in the box, and any other Cost Centers available for this Patron are in the dropdown box, so that changes to Primary Cost Center can easily be made.

If the desired Cost Center isn't on the list, click the **Add/Edit Cost Ctr button** to bring up the **Add/Edit Cost Center Form**.

Add/Edit Cost Center Form

Displaying All Cost Centers

All current Cost Center values are available in this form. Records can be added and edited here from either the Patron or Department Information forms.



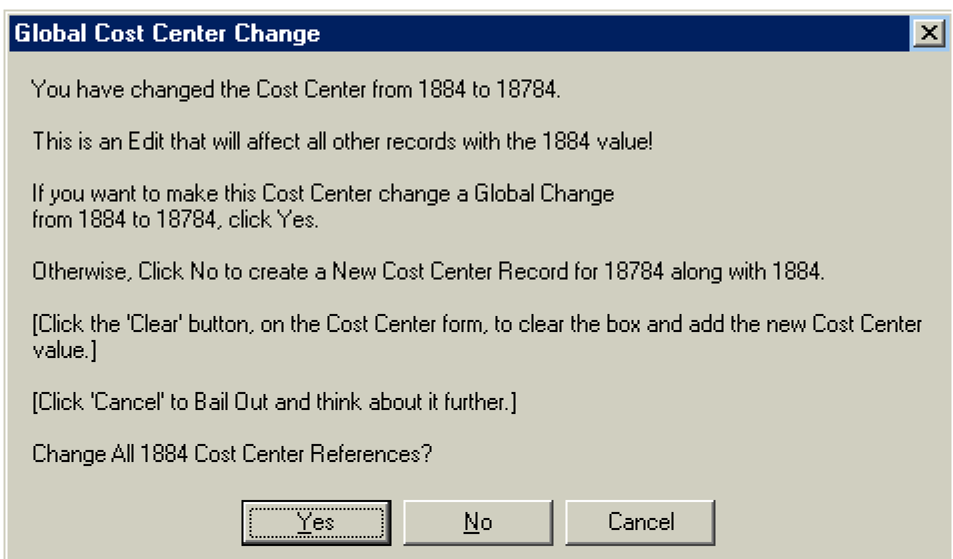
The list shows all Cost Centers in the file, with the Cost Center from the Patron/Dept being edited in the Edit Box. To add a new Cost Center, click Clear and type in the new value.

To choose a new value from the list of existing Cost Centers. Just click the value on the list until it replaces the 1884 now in the box.

To edit the current value, make changes in the edit box.

Global Cost Center Changes

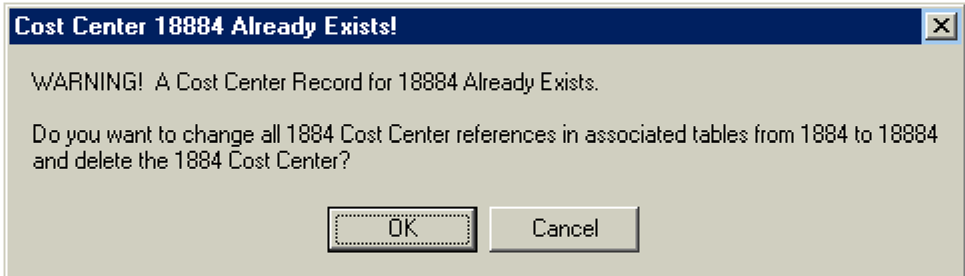
When you make a change, you will also be given a chance to propagate this change to all other iterations of the current value (1884, in this case):



If you want to change all the 1884s in the database to 18784, click Yes. If you just want to add the new one, click No. To bail out entirely, click Cancel.

Mapping One Cost Center Value to Another

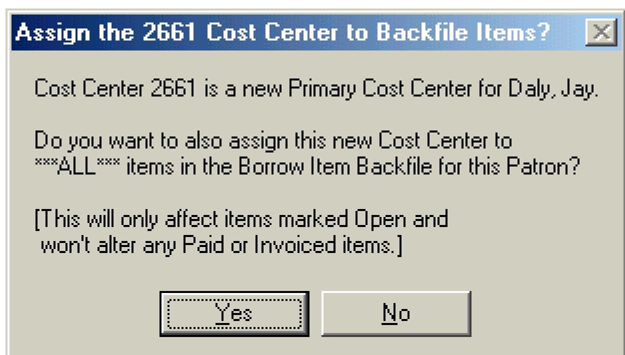
If you want to map a current Cost Center to another existing Cost Center, just edit the current value to match that exiting Cost Center value. When you click Ok to save, you'll be asked if you want to map the old value to the new.



When you click Ok or Back. Whatever value is currently in the Cost Center Edit box will be brought back with you.

Assigning new Patron Cost Center to Backfile Records

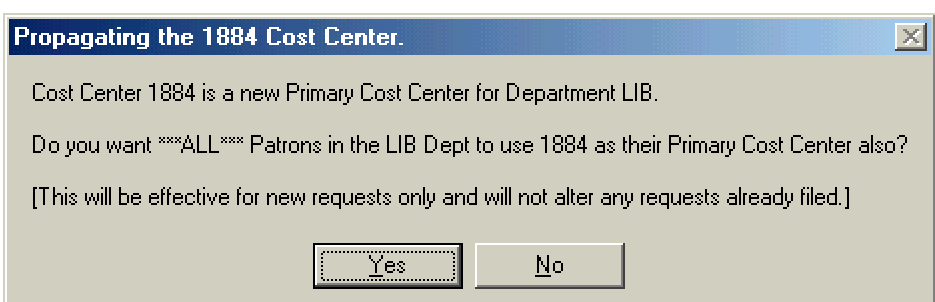
If this Cost Center is a new Primary Cost Center, you'll be asked if you want to apply this new Cost Center to ALL Borrow Items for that Patron:



If you click Yes, then all Patron Borrow records with the Local Status of Open will be assigned this new Cost Center value. You might want to be careful about this if you have other, specialized Cost Centers assigned to this Patron (Grant numbers, etc.).

Assigning new Dept Cost Center to All Patrons in Dept

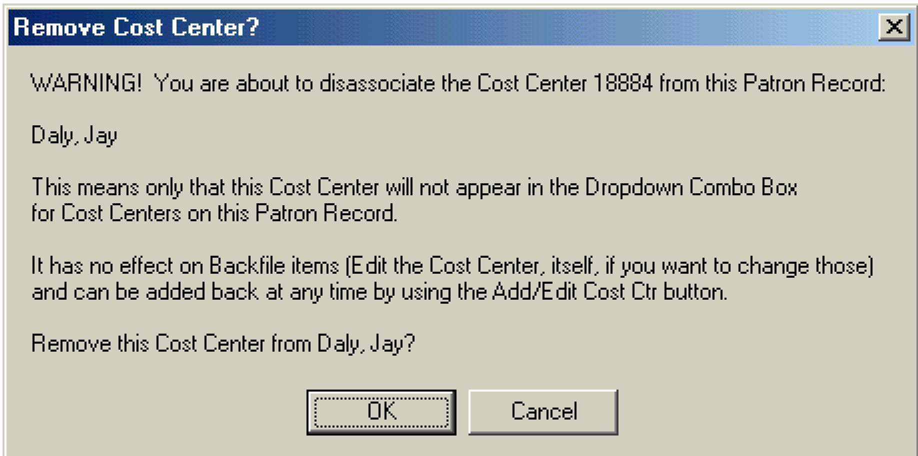
If you change the Primary Cost Center for a Department, you will be given the chance to extend this Cost Center change to all members of that Department:



Answering Yes here will propagate this new Cost Center to all Patrons in the Department. It will make changes in the Patron records only, and won't affect any items already in the Backfile or Outstanding file; in other words, it will be used as the default Cost Center only for items requested after this date.

Disassociating a Cost Center from a Patron or Dept

To disassociate a Cost Center from a Patron or Department first move it from its place in the dropdown list to the Primary Cost Center box. Answer No to any prompts for Global Changes, etc. **Right-click** the **Add/Edit Cost Ctr** button to prompt for the removal of this Cost Center from those associated with this Patron or Department:

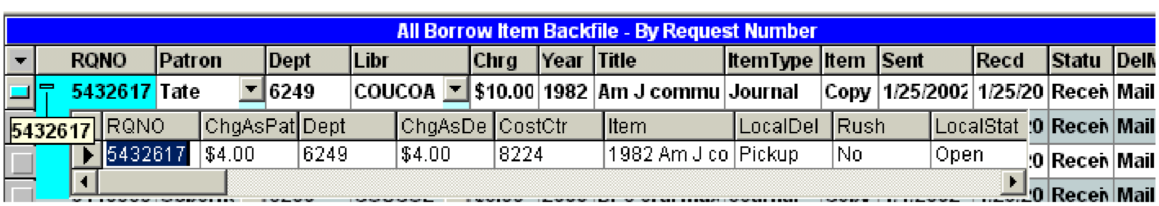


This will **Remove the Cost Center** from the list of those associated with this Patron or Department. It won't affect any earlier assignments of this Cost Center to individual items, but it will result in the Cost Center appearing to be blank when the item is viewed by clicking the + sign in a regular Borrow Grid, since the contents of the Cost Center field are vetted on the fly each time the subgrid is opened, and only values associated with the Patron on that line are allowed.

In most cases, it's probably less confusing to simply leave it, unused, in the dopdown list of Cost Centers for that Patron or Department.

Cost Centers in the Borrow Items Grids

You can access the Cost Center information for each item in the Local Billing sub-Grid by clicking on the + sign to the left of the record. Since this will toggle between the Citation Records (tblBorrBibs) and the **Local Billing view** (tblBorrLocals), you may have to click a few times before the proper view comes up. The Cost Center assigned to each item can be changed here with any value currently associated with that Patron/Dept; these values will populate the dropdown box when the Grid item is opened.



You can also edit the **ChgAsPatron** and **ChgAsDept fields** at the same time.

Cost Centers in the Local Billing Grid

Cost Centers appear at the top level of the Local Billing Grid, with dropdown boxes populated with all associated Cost Centers to make any changes necessary.

All Local Billing Items - By Request

	RQNO	Patron	PatChrg	Dept	CostCenter	Item	Local	Rush	Local	Recd	Paid On	Loc
	5988555	Aubrecht	$4.00	RADIO	1884	1999 Transplant i	Pickup	No	Open	2/26/2002		
	6550447	Aubrecht	$4.00	RADIO	1884	2000 Clinical J pa	Pickup	No	PaidP	4/12/2002	8/5/2002	[Inv
	2812876	Barqawi-	$4.00	NEPH	2661	1997 Risk adjustn	Pickup	No	InvDe	1/25/2002		[Inv
	5419498	Barqawi-	$4.00	NEPH	8115	1993 Crit reviews	Pickup	No	InvDe	1/25/2002		[Inv

While you're allowed to change the Cost Center even for items that have already been Invoiced or Paid, it won't change the value of the Invoice or Payment already created. To make a true change, first delete the Payment on the Payments Form (if the item was Paid) and then delete the Invoice, either from the Payments Table or by changing the Local Status back to Open. Then run the Invoice again with the new Cost Center value for that item.

Local Billing

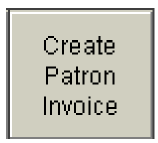
Billing Options and Forms

Local Billing Grid Tool Bar Button

Choose the **Local Billing Button** on the Tool Bar to get to the Local Billing Grid.

This Grid shows Local Billing-related information, including Paid Date and the Invoice Number related to each item. When you select the **Local Billing Grid**, an additional criterion on Charge <> 0.00 is applied, so that the **Local Billing Grid won't include FREE items**. It is a list of items with either PatChrg > 0.00 or DepChrg > 0.00 that have been received. No items where both the Patron and Dept Charges are Free will be included; these must be edited in the Locals Sub-Grid of the Borrow Items Backfile Grid, if they are incorrectly set to 0.00. Better yet, properly setting the **Local Charge Profile** for this Patron will automatically compute and display the proper charge when the item is Received.

The Local Billing Grid also includes two special **Ribbon Search Buttons:**

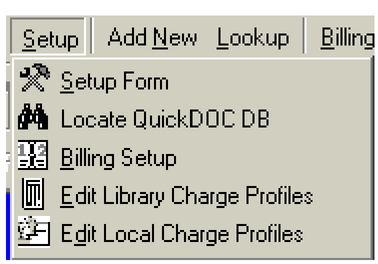


This ribbon button will appear when the default search is a Patron Search (which is most of the time). After the Search Dept button is clicked, though, the ribbon button will change to:

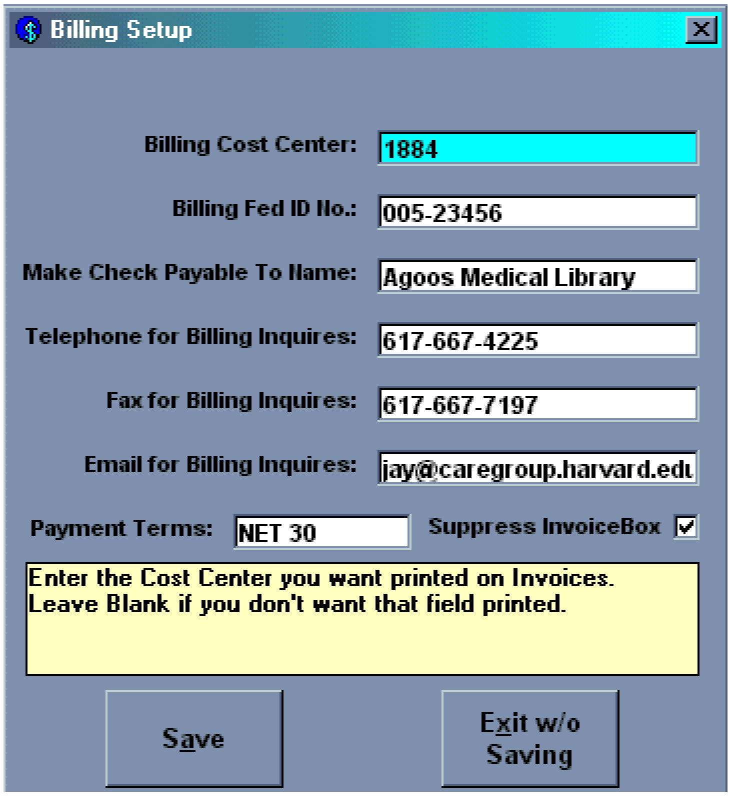
For more information on creating Invoices from within the Local Billing Grid, see the Local Billing Grid section, below.

Local Billing Setup Menu Item

Before printing Invoices for the first time (and whenever you need to make changes to any of the Invoice boilerplate information thereafter), check under the **Setup** Menu for **Billing Setup**, which contains values for items normally printed on an Invoice (for now, the same setup is used for Local Billing as is used for Library Billing).



Billing setup includes the following items:



Brief descriptions and context-sensitive help are in the yellow box just above the Command Buttons.

Print Local Invoices

All Print Invoices choices are on the **Local Billing Menu** on the Menu Bar.

The Invoices choice is also available under the **Reports** Menu Bar item, **Borrowed Items**. Use this method to print a regular monthly Invoice run. Invoices can be printed to **Print Preview**, in order to get an idea as to what will be generated, or to any **Printer** that shows up in your list of Printers. **Local Invoices can also be printed with up to 5 copies** on each run.

Local Invoice Numbers are composed of:

For **Patron Invoices**: P+the Patron Number + a unique number from 0001 to 9999

For **Dept Invoices**: D+the first 5 characters of the Dept Abbr + unique number from 0001 to 9999

For **Cost Ctr Invoices**: C+the first 5 characters of the Cost Ctr + unique number from 0001 to 9999

The last Invoice Number used is kept in the **tblLocals** Table in QuickDOC.MDB, under the tag **LastDepInv** for Depts/Cost Centers, or **LastPatInv** for Patron Invoices.

How Items are Selected to be included in an Invoice:

1. The item must have a Patron or Dept **Local Charge** other than 0.00
2. **Local Status** must read **Open**.

In the Local Billing Grid below, only the last two items, with the red check marks, would appear on an invoice run, either the automatic batch run or a single Invoice printed from the 'Create Invoice' button:

All Local Billing Items - By Request

RQNO	Patron	PatChrg	Dept	CostCenter	Item	Local	Rush	Local	Recd	Paid On	Loc
5498017	Adams	$4.00	PUL M	6100	2001 Ann hemato	Pickup	No	PaidD	1/31/2002	8/4/2002	[Inv
6484387	Adams	$4.00	PUL M	Pulm001	2002 J healthcare	Pickup	Yes	PaidD	4/10/2002	8/4/2002	[Inv
5498016	Albano	$0.80	NC	6100	2000 Pediatric he	Pickup	No	PaidP	1/31/2002	8/4/2002	[Inv
5752428	Albano	$0.30	7540	7887	1999 Cancer prac	Pickup	No	PaidP	1/31/2002	8/4/2002	[Inv
5925491	Amer	$4.00	INF DIS	8110	1952 Am J public	Pickup	No	Open	2/19/2002		
5934945	Amer	$5.00	INF DIS	8110	1963 Br medical .	Pickup	No	Open	2/20/2002		

Print Patron Bills

The **Print Patron Bills** choice prints the batch of Invoices using the **CHRGAsPatron** charge (the header is **PatChrg** on the Local Billing Grid) for the period selected. The Patron Invoice format is as follows:

Invoice

01-Jan-02 to 30-Apr-02

Invoice Numbers for Patrons begin with P + the Patron Number.

15-Aug-2002 **Invoice Number: P160 0069** **Page 1**

Make Check Payable To: Agoos Medical Library **Terms: NET 30**

Beth Israel Deaconess Medical Center
Agoos Medical Library
330 Brookline Ave.
Boston, MA 02215

Tel: (617) 667-4225
Fax: (617) 667-7197
jay@caregroup.harvard.edu

Cost Center: 1884

Include copy of Invoice or Inv No. with payment

Bernice Pasut ← Patron Name
HEMONC ← Dept
B115 ← Mail stop (if full address isn't in Patron record)

Primary Cost Center: 7887

Invoice Total: $8.00

Item#	*Dept*	*Cost Ctr*	*ReqID*	*Item*	*Charge*	*Date Rec'd*
1	NC		05932236	1998 Quality of life from nursing patient perspectives	$4.00	01-Apr-02
Total Items With No Cost Center: 1				**No Cost Ctr $:**	**$4.00**	
2	HEMONC	7887	04915478	1998 Quality of life from nursing and patient perspect	$4.00	26-Feb-02
Total Items For Cost Center 7887 : 1				**Cost Ctr Chrg:**	**$4.00**	
Total Items For Pasut, Bernice: 2				**Total Charges:**	**$8.00**	

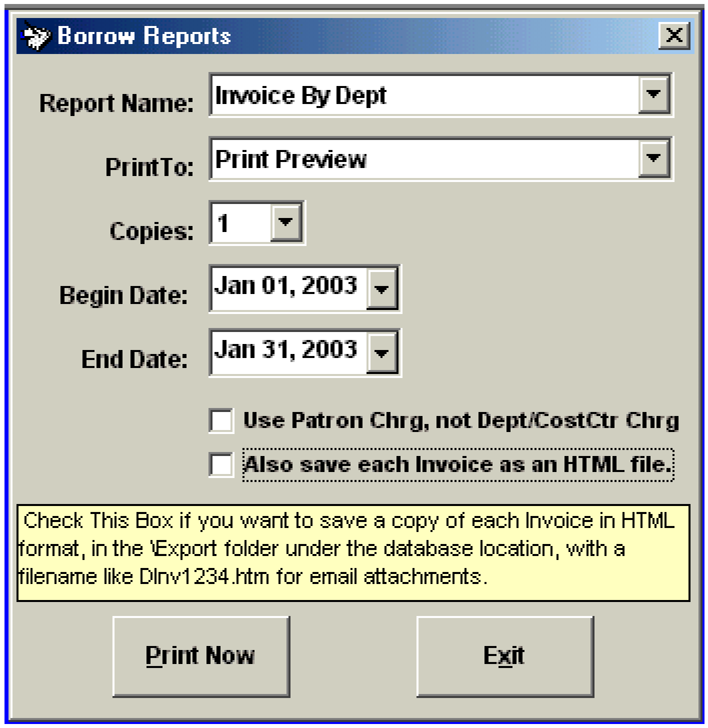
All **Invoices are subtotaled by Cost Center**, if more than one Cost Center is indicated. The Primary Cost Center that is filed with the Patron or Department record is indicated at the top, as well as on the individual item line, if a Cost Center was associated with that item at the time it was received.

During each Patron Invoice Print, the **Local Status** of each item will be set to **InvPat** , the **CHRGAsPatron** value will be copied to the **LocalCHRG** field, the **Invoice Number** will be copied to the **LocalInvoice** field, and all information about each invoice will be added as a **Patron Invoice Record** in **tblPatInvoices** in QuickDOC.MDB.

Once the Invoice is printed for an item, the **Invoice Number is available on the Local Billing Grid, in the Local Invoice column**, format **[Inv=P160 0069]**. It can be searched under just "**Containing**" 0069 in most cases.

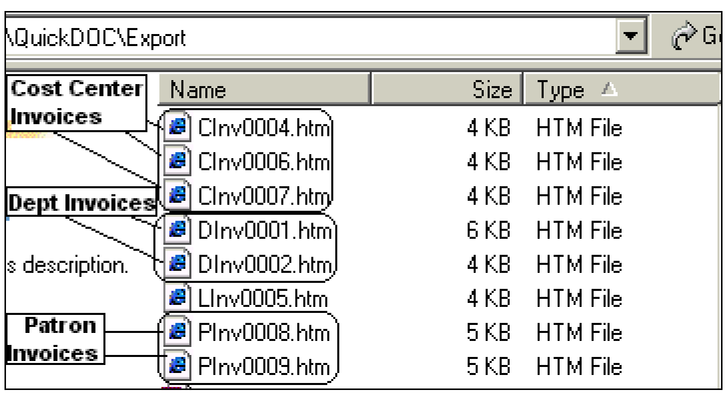
HTML Invoice option for Electronic Patron Billing

At the time Patron or Department Invoices are printed each month, you can opt to save a copy of each Invoice as an HTML file. These HTML versions of the **Patron**, **Department** or **Cost Center Invoice** can be forwarded as an email attachment to Patrons and Departments you wish to bill electronically. To save an HTML version of an Invoice run, check the **Also save each Invoice as an HTML file** checkbox on the Borrow Reports form after choosing the Invoice By Patron Report. Invoices printed, or reprinted, from the Local Billing Grid will also provide a prompt for this save.



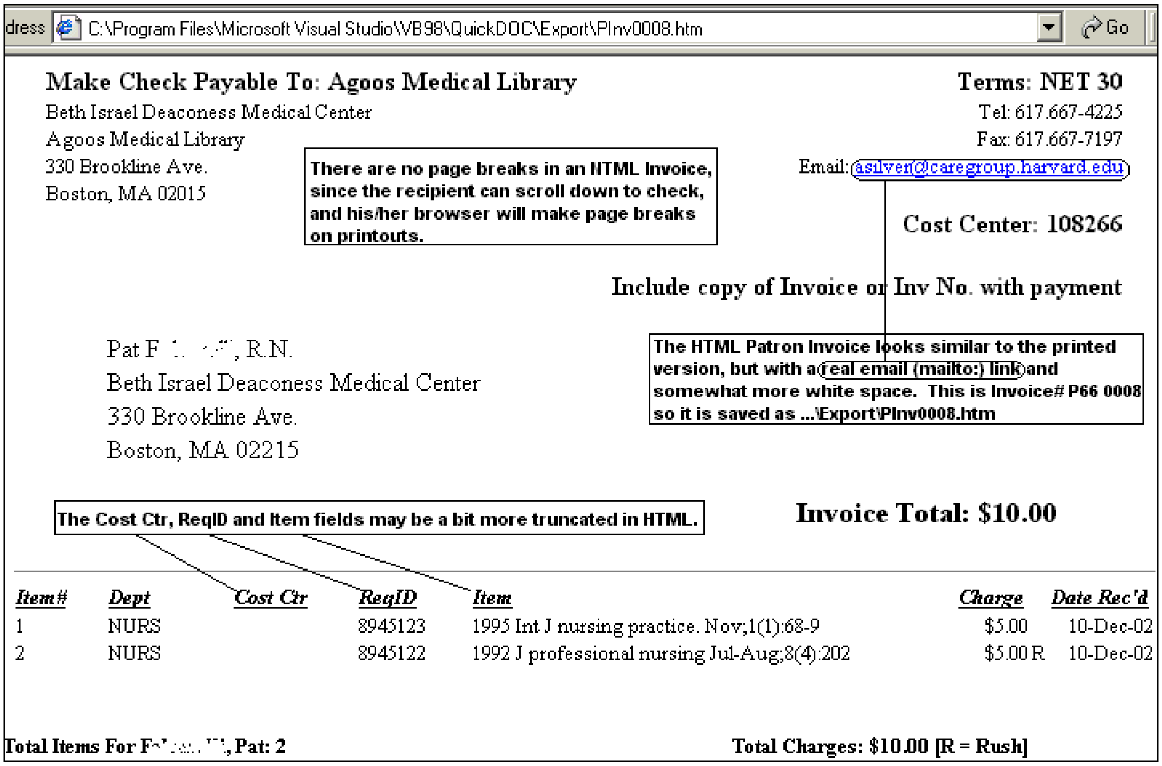
If this box is checked, a copy of each invoice will be saved in the **Export folder** that always exists just beneath the location of the QuickDOC.MDB database. All **Patron Invoice HTML files** will be in the format **PInv####** (where #### is the actual four-digit invoice number), e.g., PInv1234.

Since these files aren't created during Print Preview, it will be necessary to print at least one copy of the invoice in order to have the file generated. Once the files are made, you can use the printouts to identify the files to send as email attachments. They will all be together in the Export folder:



These **HTML Invoice files will be deleted when an Invoice is deleted**, and also **when an Invoice is paid**, but it will be useful to clean these files out from time to time to prevent clutter. If you delete an HTML Invoice file that you later want to resend, you can **recreate it by running a Reprint of the original Invoice**.

HTML Invoices are quite similar to printed Invoices and will be displayed in whatever might be the default Browser of whoever clicks on the file icon. Displayed in Internet Explorer, the Patron Invoice looks as follows:



dress C:\Program Files\Microsoft Visual Studio\VB98\QuickDOC\Export\PInv0008.htm Go

Make Check Payable To: Agoos Medical Library
Beth Israel Deaconess Medical Center
Agoos Medical Library
330 Brookline Ave.
Boston, MA 02015

Terms: NET 30
Tel: 617.667-4225
Fax: 617.667-7197
Email: asilver@caregroup.harvard.edu

There are no page breaks in an HTML Invoice, since the recipient can scroll down to check, and his/her browser will make page breaks on printouts.

Cost Center: 108266

Include copy of Invoice or Inv No. with payment

Pat F [illegible], R.N.
Beth Israel Deaconess Medical Center
330 Brookline Ave.
Boston, MA 02215

The HTML Patron Invoice looks similar to the printed version, but with a real email (mailto:) link and somewhat more white space. This is Invoice# P66 0008 so it is saved as ...\Export\PInv0008.htm

The Cost Ctr, ReqID and Item fields may be a bit more truncated in HTML.

Invoice Total: $10.00

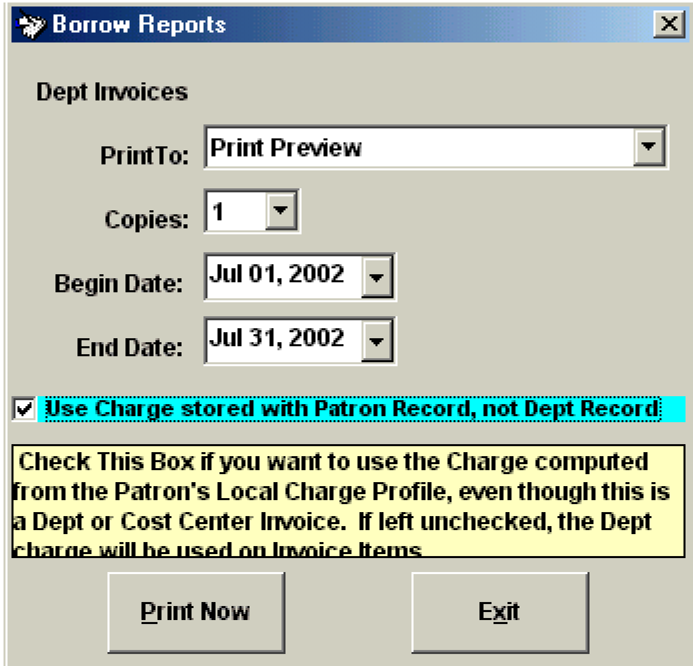
Item#	*Dept*	*Cost Ctr*	*ReqID*	*Item*	*Charge*	*Date Rec'd*
1	NURS		8945123	1995 Int J nursing practice. Nov;1(1):68-9	$5.00	10-Dec-02
2	NURS		8945122	1992 J professional nursing Jul-Aug;8(4):202	$5.00 R	10-Dec-02

Total Items For F[illegible], Pat: 2 **Total Charges: $10.00 [R = Rush]**

Unused copies won't hurt anything, but will require cleaning out that Export folder from time to time. At some point I hope to have some general profile for suppressing this box for those who will never print an HTML Invoice, but for now just press **N** here and keep the **HTML checkbox** unchecked in the batch Invoice prints.

Print Dept Bills

The **Print Dept Bills** choice prints the batch of Invoices using the **CHRGAsDept** value (the header is **DeptChrg** on the Local Billing Grid) for the period selected. Unlike the Patron Bills choice, the Department Invoice form includes an additional **Use Charge stored with Patron Record Checkbox** that will allow the Invoice run to use the **CHRGAsPatron** value rather than the default CHRGAsDept value, so that individual Patrons within a Department can be charged according to a different charge schedule, when this is appropriate.



The **Department Invoice** is similar to the Patron Invoice, as illustrated below:

Sample Dept Invoice

Include copy of Invoice or Inv No. with payment

Hematology/Oncology [HEMONC]
Beth Israel Deaconess Medical Center
RA-430
330 Brookline Ave.
Boston, MA 02215

Primary Cost Center: 7887

Invoice Total: $45.10

Both Dept and Patron Invoices are broken down by Cost Center, if more than one Cost Center is indicated. Items with no cost center attached are shown first.

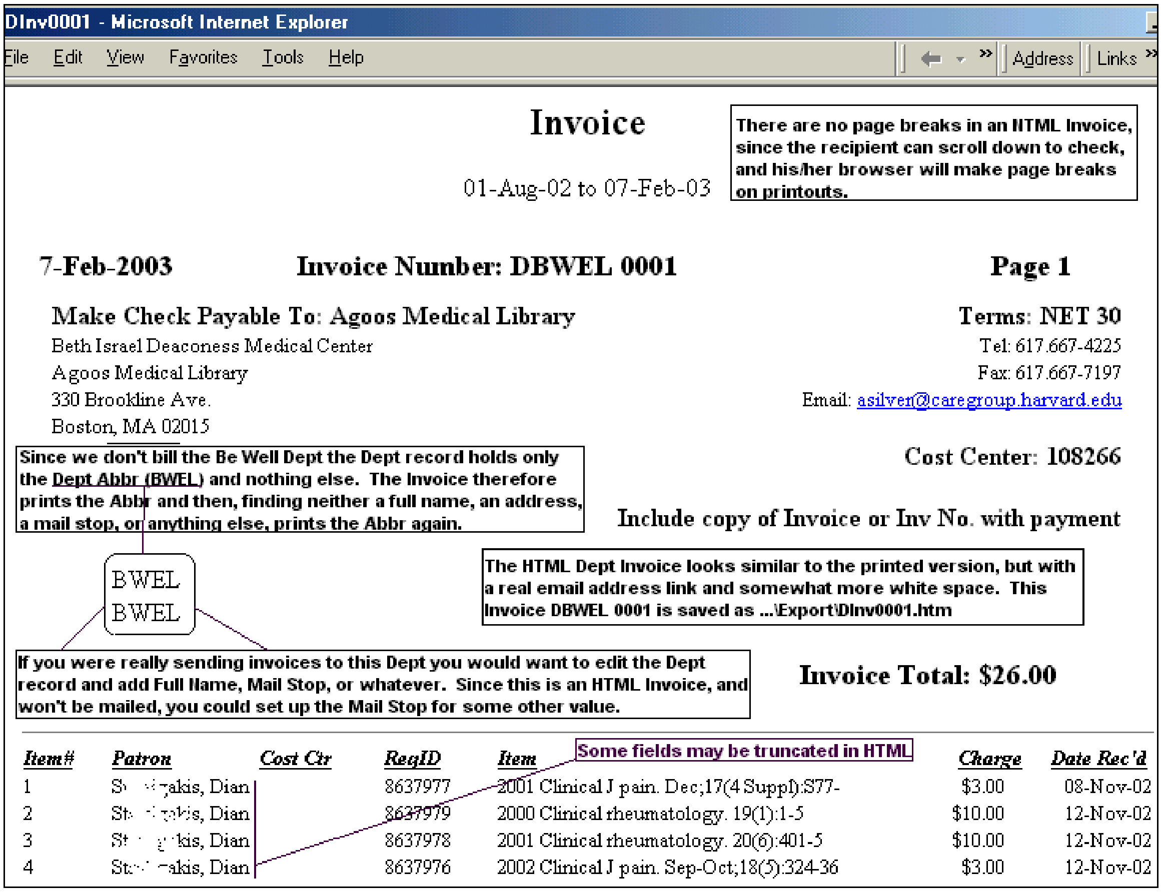
Item#	*Patron*	*Cost Ctr*	*ReqID*	*Item*	*Charge*	*Date Rec'd*
1	Fleitz, Julie		5644194	1993 J abnormal psychology. May;102(2):248-58	$1.10	25-Jan-02
2	Servetar, Ellen		5812717	1999 Hospital topics. Winter;77(1):14-26	$4.00	08-Feb-02
3	Servetar, Ellen		5812716	2000 J clinical nursing. Jan;9(1):71-82	$4.00	11-Feb-02
4	Servetar, Ellen		5812812	2000 Nursing times. 96(27 July 6-12):12-	$4.00	11-Feb-02
Total Items With No Cost Center: 4				**No Cost Ctr $:**	**$13.10**	
5	Pearson, Joanne	1884	5683523	1998 Insight (Am Society of Ophthalmic Registered Nurs	$4.00	07-Feb-02
6	Pearson, Joanne	1884	5683596	2001 Nurse education today. May;21(4):323-33	$4.00	07-Feb-02
7	Schulz, Laura	1884	5869759	2000 Ann hematology. Aug;79(8):407-13	$4.00	14-Feb-02
8	Schulz, Laura	1884	5935026	1992 Immunology letters. Dec;34(3):207-11	$4.00	19-Feb-02
9	Schulz, Laura	1884	5935027	1981 Infection immunity. Aug;33(2):636-40	$4.00	20-Feb-02
10	Schulz, Laura	1884	5935025	1986 Am J hematology. Jan;21(1):23-7	$4.00	26-Feb-02
Total Items For Cost Center 1884 : 6				**Cost Ctr Chrg:**	**$24.00**	
11	Hakes, Diane	7540	5762776	1998 Patient education counseling. Jul;34(3):185-200	$4.00	06-Feb-02
Total Items For Cost Center 7540 : 1				**Cost Ctr Chrg:**	**$4.00**	
12	Pasut, Bernice	7887	04915478	1998 Quality of life from nursing and patient perspect	$4.00	26-Feb-02
Total Items For Cost Center 7887 : 1				**Cost Ctr Chrg:**	**$4.00**	
Total Items For HEMONC: 12				**Total Charges:**	**$45.10**	

During each Department Invoice Print, the **Local Status** of each item will be set to **InvDep** , the **CHRGAsDept** value will be copied to the **LocalCHRG** field (unless the **CHRGAsPatron** checkbox has been checked), the **Invoice Number** will be copied to the **LocalInvoice** field, and all information about each invoice will be added as a **Department Invoice Record** in **tblDepInvoices** in QuickDOC.MDB.

Once the Invoice is printed for an item, the **Invoice Number is available on the Local Billing Grid, in the Local Invoice column**, the Department format (not shown above) is **[Inv=DHEMON 0029]**. It can be searched under just "**Containing**" 0029 in most cases.

HTML Invoice option for Department Billing

All **Department Invoice HTML files** will be in the format **DInv####** (where #### is the actual four-digit invoice number), e.g., DInv1234. The format follows that of the printed Invoice:



DInv0001 - Microsoft Internet Explorer

File Edit View Favorites Tools Help Address Links

Invoice

01-Aug-02 to 07-Feb-03

There are no page breaks in an HTML Invoice, since the recipient can scroll down to check, and his/her browser will make page breaks on printouts.

7-Feb-2003 Invoice Number: DBWEL 0001 Page 1

Make Check Payable To: Agoos Medical Library

Beth Israel Deaconess Medical Center
Agoos Medical Library
330 Brookline Ave.
Boston, MA 02015

Terms: NET 30
Tel: 617.667-4225
Fax: 617.667-7197
Email: asilver@caregroup.harvard.edu

Since we don't bill the Be Well Dept the Dept record holds only the Dept Abbr (BWEL) and nothing else. The Invoice therefore prints the Abbr and then, finding neither a full name, an address, a mail stop, or anything else, prints the Abbr again.

Cost Center: 108266

Include copy of Invoice or Inv No. with payment

BWEL
BWEL

The HTML Dept Invoice looks similar to the printed version, but with a real email address link and somewhat more white space. This Invoice DBWEL 0001 is saved as ...\Export\DInv0001.htm

If you were really sending invoices to this Dept you would want to edit the Dept record and add Full Name, Mail Stop, or whatever. Since this is an HTML Invoice, and won't be mailed, you could set up the Mail Stop for some other value.

Invoice Total: $26.00

Some fields may be truncated in HTML

Item#	Patron	Cost Ctr	ReqID	Item	Charge	Date Rec'd
1	S[illegible]akis, Dian		8637977	2001 Clinical J pain. Dec;17(4 Suppl):S77-	$3.00	08-Nov-02
2	St[illegible]kis, Dian		8637979	2000 Clinical rheumatology. 19(1):1-5	$10.00	12-Nov-02
3	St[illegible]kis, Dian		8637978	2001 Clinical rheumatology. 20(6):401-5	$10.00	12-Nov-02
4	St[illegible]akis, Dian		8637976	2002 Clinical J pain. Sep-Oct;18(5):324-36	$3.00	12-Nov-02

Some fields are truncated on the HTML version.

Patron or Dept Trial Invoices

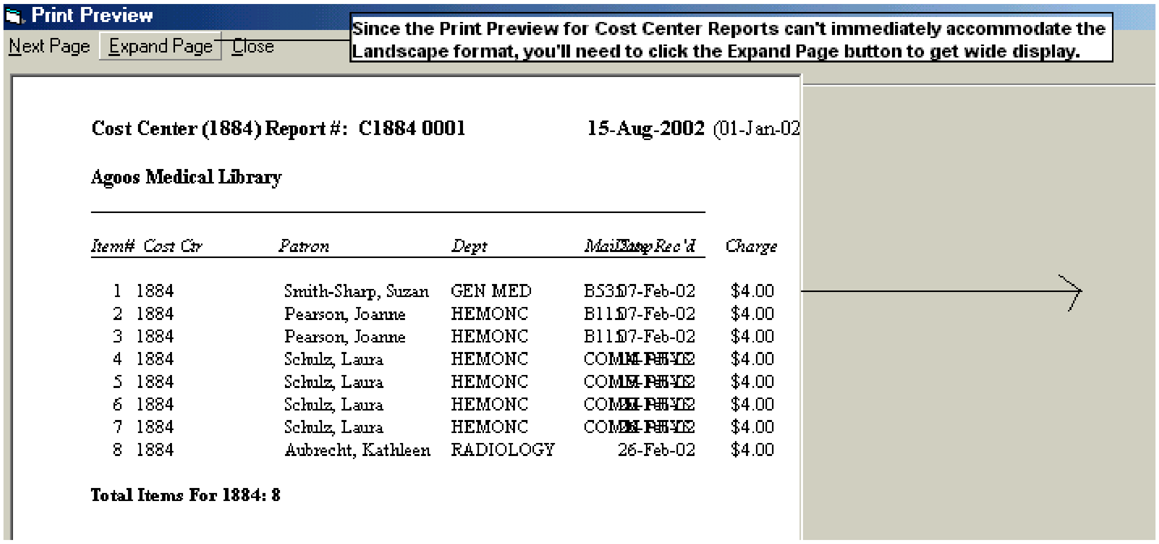
The **Patron Trial Invoices** and **Dept Trial Invoices** choices print exactly as the Invoice run will print, except that Invoice Numbers aren't assigned, and only one copy of each Invoice is printed. Use this instead of the Print Preview to generate actual invoices that can be used for proofreading and editing prior to running the actual invoices.

Print Cost Center Report

The **Cost Center Report** has a different format than either the Patron or Department Invoice, but **it also functions as an Invoice**, and will set the **Local Status to InvDep** and will file an Invoice record in **tblDepInvoices** in QuickDOC.MDB.

The **Print Cost Center Report** choice prints a batch of Individual Reports/Invoices, one for each Cost Center represented during the period in question, using the **CHRGAsDept** value for the period selected. Like the Department Invoice form, the Cost Center Report form also includes an additional **Use Charge stored with Patron Record Checkbox** that will allow the Report run to use the **CHRGAsPatron** value rather than the default CHRGAsDept value, so that individual Patrons within a Cost Center can be charged according to a different charge schedule, when this is appropriate.

The **Cost Center Report format** is set to Landscape by default. When first displayed in Print Preview, the form may be displayed incorrectly, as below:



Cost Center (1884) Report #: C1884 0001 15-Aug-2002 (01-Jan-02

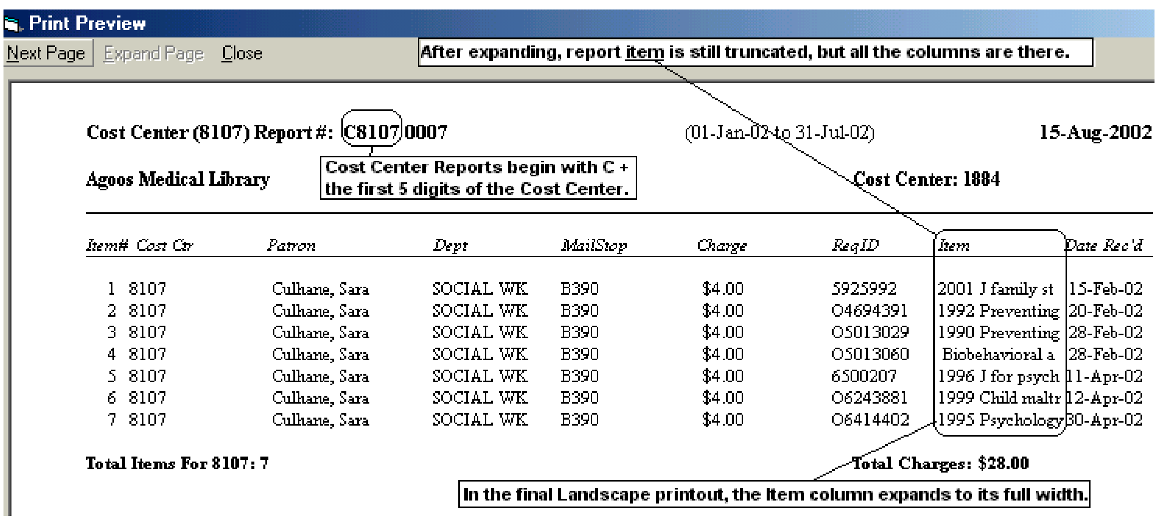
Agoos Medical Library

Item#	Cost Ctr	Patron	Dept	MailStop Date Rec'd	Charge
1	1884	Smith-Sharp, Suzan	GEN MED	B53107-Feb-02	$4.00
2	1884	Pearson, Joanne	HEMONC	B11107-Feb-02	$4.00
3	1884	Pearson, Joanne	HEMONC	B11107-Feb-02	$4.00
4	1884	Schulz, Laura	HEMONC	COMM [illegible]	$4.00
5	1884	Schulz, Laura	HEMONC	COMM [illegible]	$4.00
6	1884	Schulz, Laura	HEMONC	COMM [illegible]	$4.00
7	1884	Schulz, Laura	HEMONC	COMM [illegible]	$4.00
8	1884	Aubrecht, Kathleen	RADIOLOGY	26-Feb-02	$4.00

Total Items For 1884: 8

Use the **Print Preview Expand Page** button to expand to right margin to the right edge of the screen.

The fully-expanded Print Preview, and the resulting printout, appear as follows:



Cost Center (8107) Report #: C8107 0007 (01-Jan-02 to 31-Jul-02) 15-Aug-2002

Agoos Medical Library Cost Center: 1884

Item#	Cost Ctr	Patron	Dept	MailStop	Charge	ReqID	Item	Date Rec'd
1	8107	Culhane, Sara	SOCIAL WK	B390	$4.00	5925992	2001 J family st	15-Feb-02
2	8107	Culhane, Sara	SOCIAL WK	B390	$4.00	04694391	1992 Preventing	20-Feb-02
3	8107	Culhane, Sara	SOCIAL WK	B390	$4.00	05013029	1990 Preventing	28-Feb-02
4	8107	Culhane, Sara	SOCIAL WK	B390	$4.00	05013060	Biobehavioral a	28-Feb-02
5	8107	Culhane, Sara	SOCIAL WK	B390	$4.00	6500207	1996 J for psych	11-Apr-02
6	8107	Culhane, Sara	SOCIAL WK	B390	$4.00	06243881	1999 Child maltr	12-Apr-02
7	8107	Culhane, Sara	SOCIAL WK	B390	$4.00	06414402	1995 Psychology	30-Apr-02

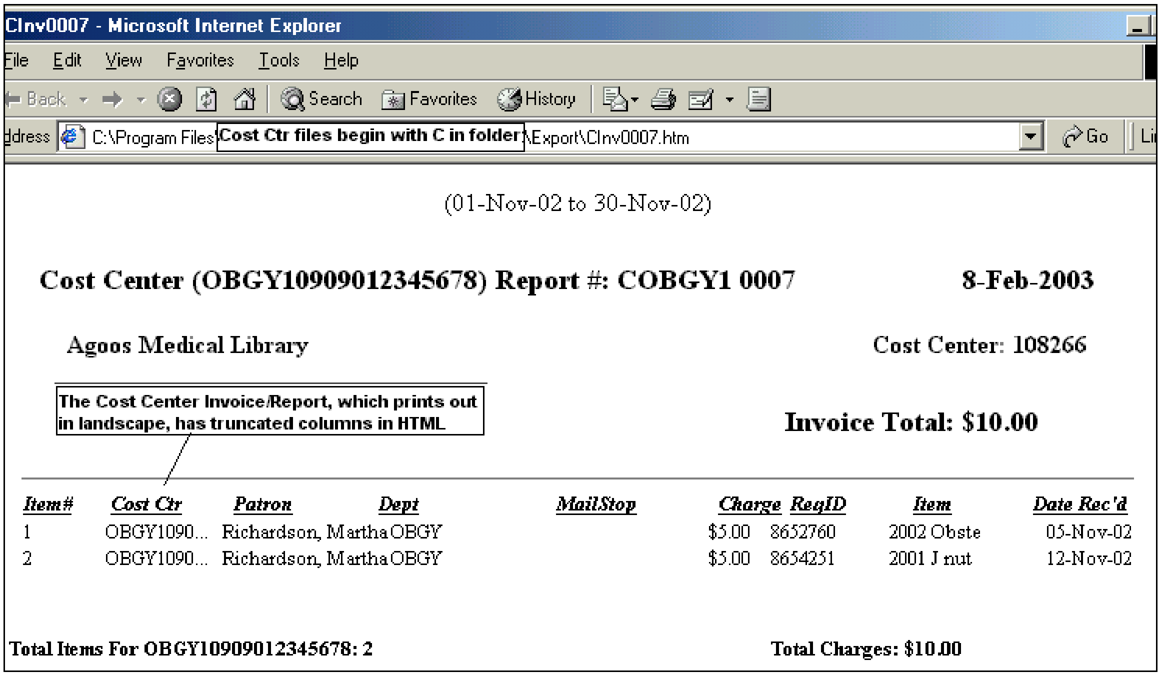
Total Items For 8107: 7 Total Charges: $28.00

During each Cost Center Report Print, the **Local Status** of each item will be set to **InvDep** , the **CHRGAsDept** value will be copied to the **LocalCHRG** field (unless the **CHRGAsPatron** checkbox has been checked), the **Invoice Number** will be copied to the **LocalInvoice** field, and all information about each invoice will be added as a **Department Invoice Record** in **tblDepInvoices** in QuickDOC.MDB.

Once the Invoice is printed for an item, the **Invoice Number is available on the Local Billing Grid, in the Local Invoice column**, the Cost Center format is **[Inv=C8107 0007]**. It can be searched under just "**Containing**" 0007 in most cases.

HTML Invoice option for Cost Center Billing

All **Cost Center Report/Invoice HTML files** will be in the format **CInv####** (where #### is the actual four-digit invoice number), e.g., CInv1234. The format follows that of the printed Invoice/Report:



Some fields are truncated on the HTML version.

Running Cost Center Reports as Reports Only

Since Cost Center Reports are also Invoices, they will make all the normal changes to **Local Status**, **LocalCHRG**, **LocalInvoice**, etc., and will post an added record to the **tblDepInvoices Table**. If you want to run the Cost Center Report as a report only, use this strategy:

1. **BEFORE running any Invoices** for the period in question, run the Cost Center Report for that period.

2. Go back to the Local Billing Grid and search the same time period as the Report, **Search By Invoice No.** "**Containing**" Inv=C. This will fill the Grid with all the items on the Cost Center Report for that period. (You can also search by **Local Status = InvDep** if you know there were no other invoices run for a Department during that period; Cost Center invoices are marked with Local Status InvDep.)

3. Change the **Local Status** of the top row back to **Open**.

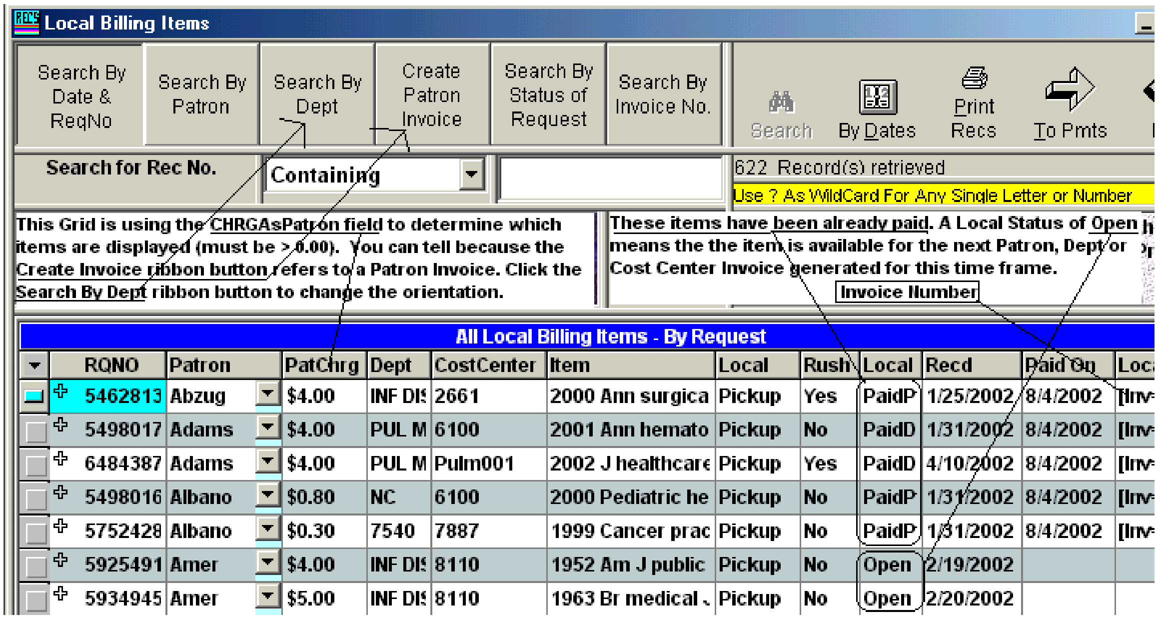
4. Click the **header on the Local Status column** and choose **Global Change**.

5. **Click Ok** when asked whether you want to change all values in that column back to Open.

After a brief pause (or perhaps not so brief if you have thousands of items to be reset) while the Global Change goes to work, the **Local Status**, **LocalCHRG**, and **LocalInvoice** values will be returned to **Open**, **0.00**, and **blank**, respectively.

Local Billing Grid

Here's an example of the **Local Billing Grid**, which is accessible through the **Local Billing Tool Bar Button**:

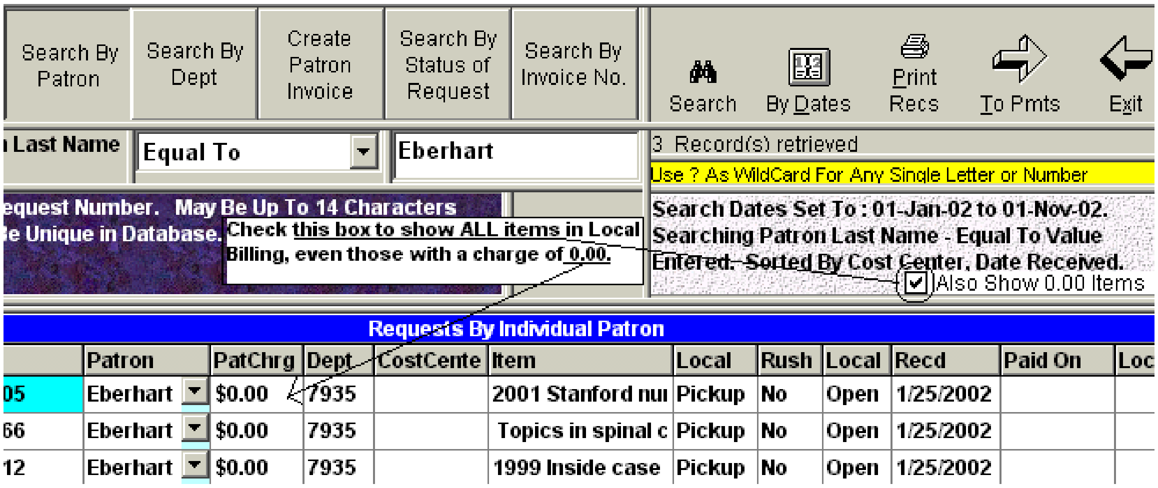


The Local Billing Grid, because it automatically screens out FREE items, makes searching and editing a bit less complicated for preparing Invoices, but be sure to check the general Borrow Grids periodically for items mistakenly filed as FREE. Clicking on a cell in the Patron Column of any Grid will expose the **To Patrons button**, where a Patron's charge may be quickly edited, so that future requests are filed with the proper charge. Clicking in the Dept Columns will expose the **To Depts button**, for similar editing of Departments. Clicking in most other Columns will expose the **To Payments button**, for **recording Local Payments**, **deleting Local Invoices**, **deleting Local Payments**, etc.

Show ALL Items in the Local Billing Grid

In the Local Billing Grid, **No Charge (0.00) Items** are usually **excluded** in the records retrieved. Items must have a charge in either **CHRGAsPatron**, **CHRGAsDept** or **LocalCHRG** to appear in the Grid. In some cases, though, you may want to see ALL of a Patron's or Department's items for a certain period, to be sure that all items for which a charge should apply were actually charged as specified.

You can cause the Local Billing Grid to **show FREE items as well as charged items** by checking the **Also Show 0.00 Items checkbox**.



The same search, run with the checkbox unchecked, would have retrieved no items for Patron Eberhart.

Create Patron Invoice (in Local Billing Grid)

The **Create Patron Invoice** button creates an Invoice for the Patron selected. Before you can create a Patron Invoice from the Grid, however, you need to first select the Patron to Invoice by clicking the **Search By Patron** ribbon button and choosing the Patron from the **Patrons List**.

The resulting list will include **ALL Items** for that Patron during the period specified, but only those with **Local Status equal to Open** and **CHRGAsPatron greater than 0.00** will be included in the Invoice.

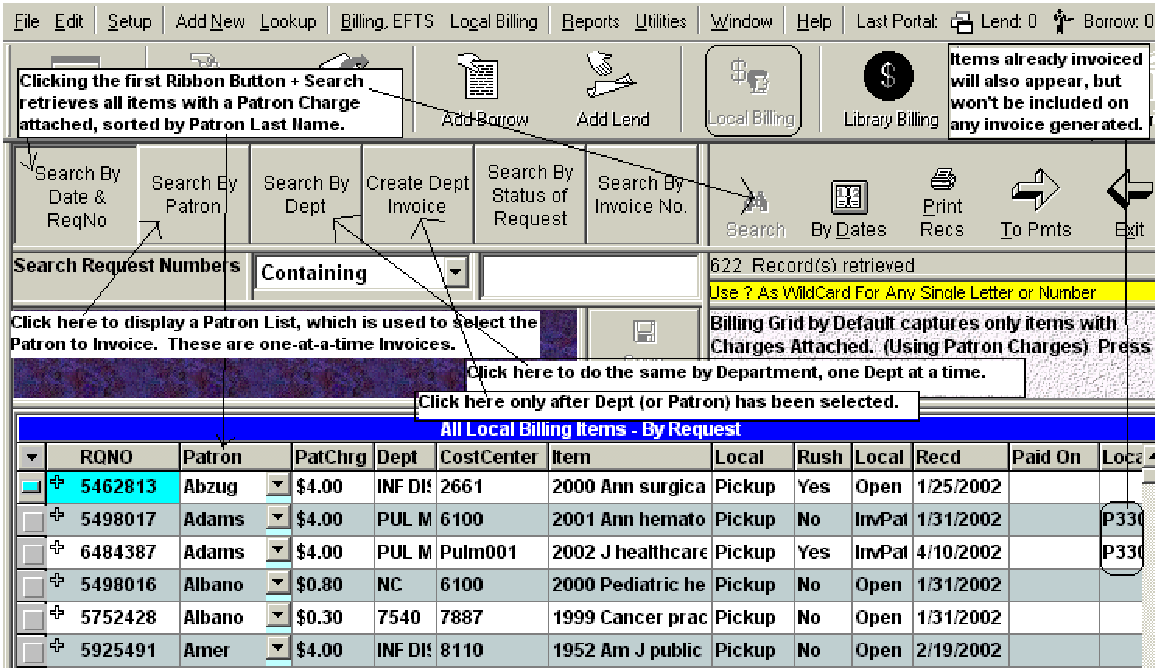
Create Dept Invoice (in Local Billing Grid)

The **Create Dept Invoice** button creates an Invoice for the Dept selected. Before you can create a Department Invoice from the Grid, however, you need to first select the Dept to Invoice by clicking the **Search By Patron** ribbon button and choosing the Patron from the **Depts List**.

The resulting list will include **ALL Items** for that Department during the period specified, but only those with **Local Status equal to Open** and **CHRGAsDept greater than 0.00** will be included in the Invoice.

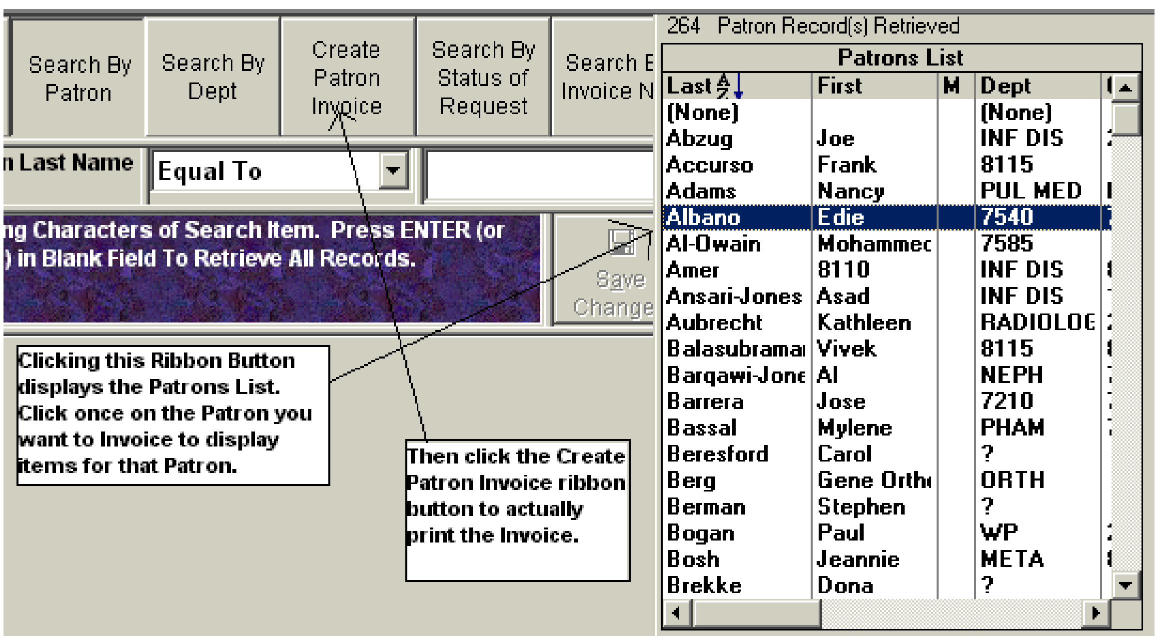
The **Create Patron Invoice** or **Create Dept Invoice** buttons create an Invoice on the spot for whichever Patron or Dept has been selected for items received during the period from the Beginning Date to the End Date selected. Here are the steps to create an Invoice for Patron Edie Albano using the Create Patron Invoice Ribbon Button of the Local Billing Grid.

1. Display Grid records for the time period involved:

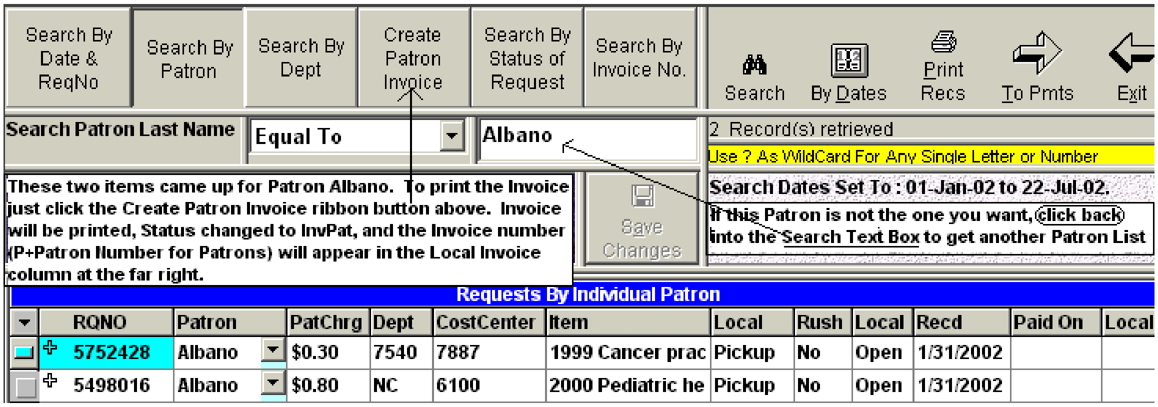


The list is sorted by Patron Name (but we can change the sort by clicking on the column header ans selecting a different sort order). We can see two Albano requests in rows 4 and 5 of the Grid.

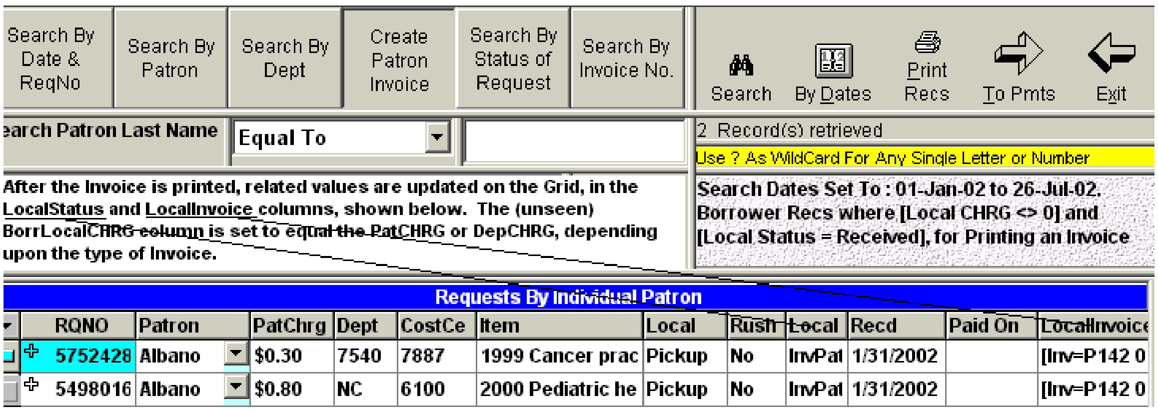
2. Click the **Search By Patron** ribbon button to select the Albano record.



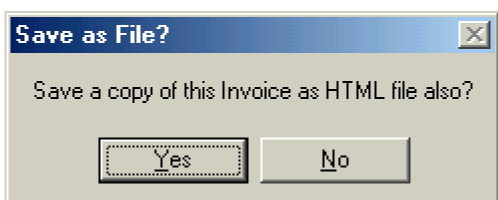
This will bring the two Albano records only into the Grid. Ready to create the invoice.



3. Click the **Create Patron Invoice** ribbon button to create the Invoice. When printing is finished you'll be brought directly back to the Grid, with Local Values changed as appropriate:



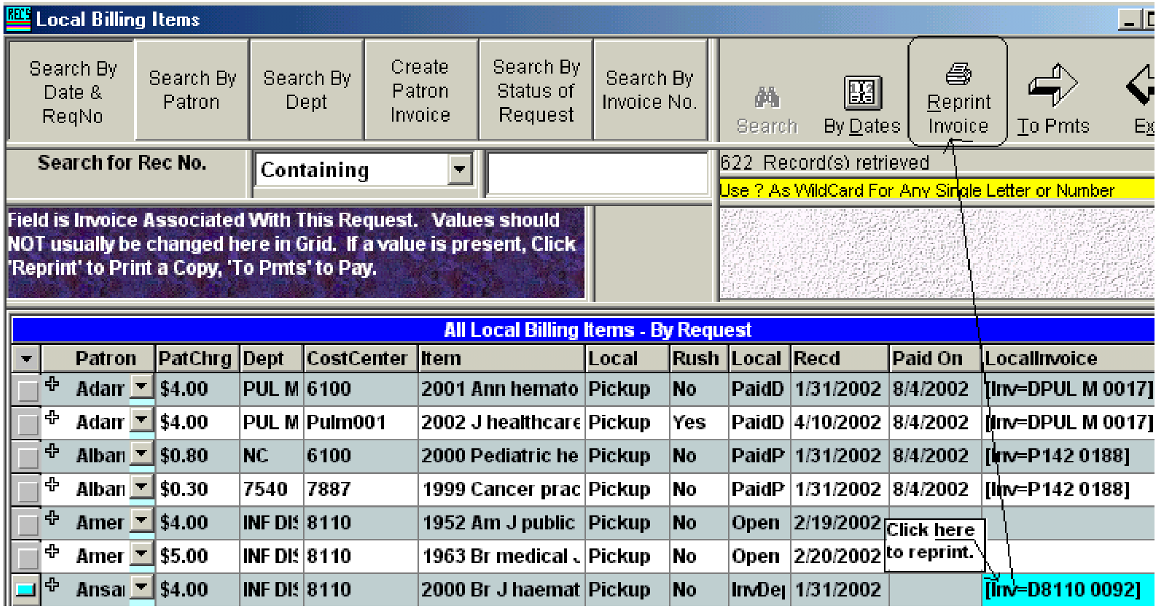
Invoices printed from the Grid are no different in format from those printed in batch. You are also asked before the Invoice is printed if you also want to save an HTML version of the Invoice:



Invoices for items printed from the Local Billing Grid will be printed using the **last Printer you specified when printing an Invoice Run**, and in the number of copies specified then, as well.

Reprint an Invoice

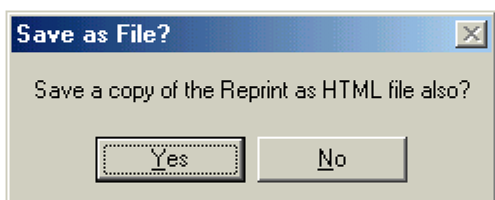
You can **Reprint a single Invoice** for any invoice listed in the **Invoice Column** on the Local Billing Grid by **clicking once on the Invoice cell to be reprinted**, then clicking the '**Reprint**' Button.



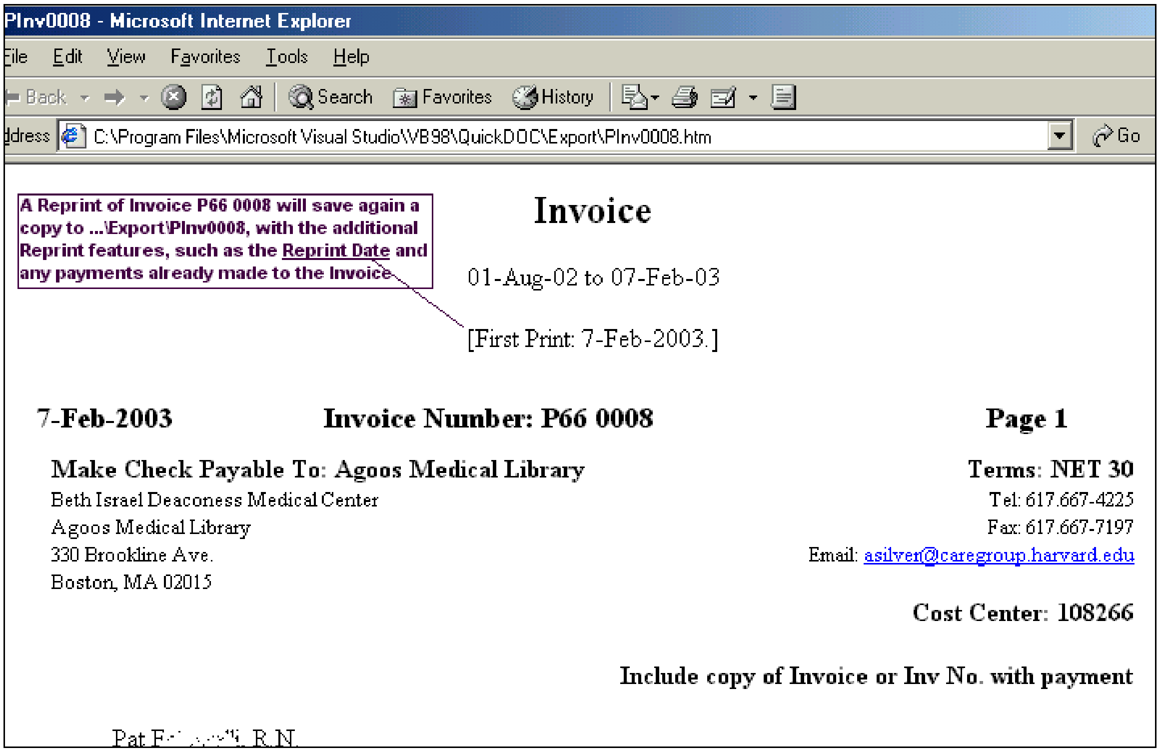
Invoices reprinted in this way will be printed, using the last Printer you specified when printing an Invoice Run, and in the number of copies specified at that time. The Reprint will include all items with that Invoice Number in the Invoice column and will re-calculate the Invoice Total as it prints, so that, if you delete an item, and then reprint that Invoice, the Invoice will include the original invoice total at the top, but a revised total at the bottom.

Payments made on an Invoice are subtracted from the Invoice Total at the top, and are also noted as Payments at the bottom of the Charge column, along with both the original and revised Invoice Totals.

On Invoices printed or Reprinted from the Local Billing Grid, you are asked before each Invoice is printed whether you also want an **HTML Invoice file save**d:



This question will appear before each print or reprint; just press **N** to dismiss it without saving as HTML, or Enter to save a copy. Invoice Reprints in HTML follow a similar format to Reprints on paper:



Invoice

01-Aug-02 to 07-Feb-03

[First Print: 7-Feb-2003.]

7-Feb-2003 **Invoice Number: P66 0008** **Page 1**

Make Check Payable To: Agoos Medical Library **Terms: NET 30**

Beth Israel Deaconess Medical Center
Agoos Medical Library
330 Brookline Ave.
Boston, MA 02015

Tel: 617.667-4225
Fax: 617.667-7197
Email: asilver@caregroup.harvard.edu

Cost Center: 108266

Include copy of Invoice or Inv No. with payment

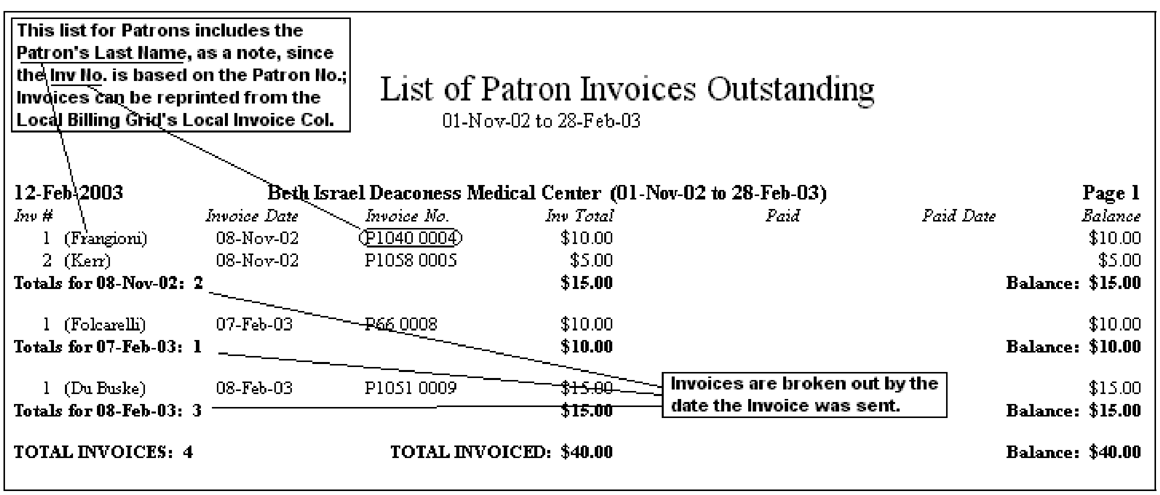
Pat F... R.N.

List of Patron Invoices Outstanding Report

List of Dept/Cost Center Invoices Outstanding Report

The Local Billing Menu Bar choice now also includes a choice for a Report of **Patron Invoices Outstanding** and **Dept Invoices Outstanding** (which includes Cost Center Reports).

Lists of Invoices Outstanding include all invoices generated during the period specified that have not been paid, or have received only partial payment. The Patron List has the following format:



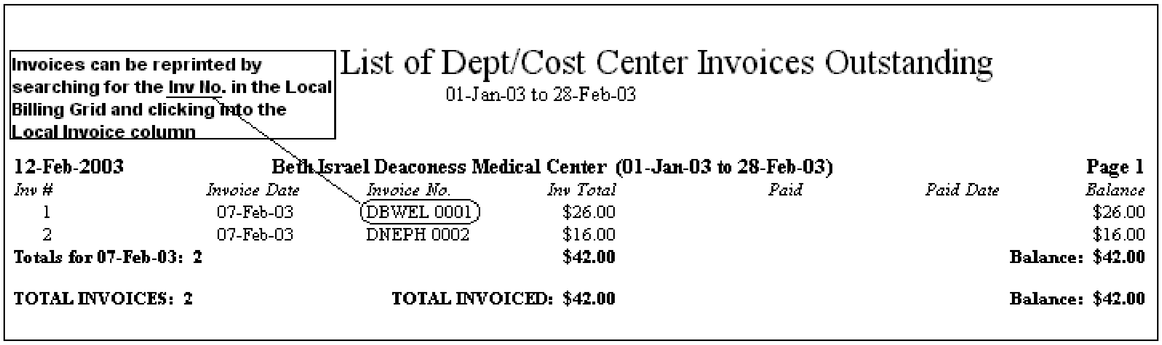
List of Patron Invoices Outstanding

01-Nov-02 to 28-Feb-03

12-Feb-2003 **Beth Israel Deaconess Medical Center (01-Nov-02 to 28-Feb-03)** **Page 1**

Inv #	*Invoice Date*	*Invoice No.*	*Inv Total*	*Paid*	*Paid Date*	*Balance*
1 (Frangioni)	08-Nov-02	P1040 0004	$10.00			$10.00
2 (Kerr)	08-Nov-02	P1058 0005	$5.00			$5.00
Totals for 08-Nov-02: 2			**$15.00**			**Balance: $15.00**
1 (Folcarelli)	07-Feb-03	P66 0008	$10.00			$10.00
Totals for 07-Feb-03: 1			**$10.00**			**Balance: $10.00**
1 (Du Buske)	08-Feb-03	P1051 0009	$15.00			$15.00
Totals for 08-Feb-03: 3			**$15.00**			**Balance: $15.00**
TOTAL INVOICES: 4		**TOTAL INVOICED:**	**$40.00**			**Balance: $40.00**

The Dept and Cost Center List is the same, but without the Patron Last Name, since the Dept Abbreviation is embedded in the Invoice Number itself:



Invoices can be reprinted by searching for the Inv No. in the Local Billing Grid and clicking into the Local Invoice column

List of Dept/Cost Center Invoices Outstanding

01-Jan-03 to 28-Feb-03

12-Feb-2003 Beth Israel Deaconess Medical Center (01-Jan-03 to 28-Feb-03) Page 1

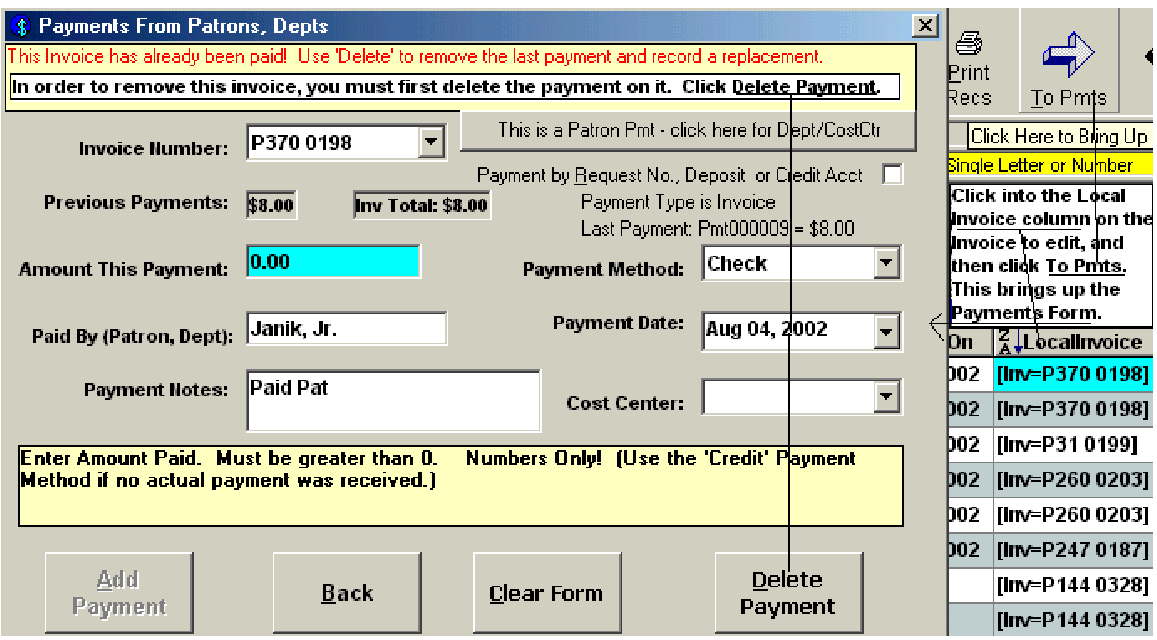
Inv #	Invoice Date	Invoice No.	Inv Total	Paid	Paid Date	Balance
1	07-Feb-03	DBWEL 0001	$26.00			$26.00
2	07-Feb-03	DNEPH 0002	$16.00			$16.00
Totals for 07-Feb-03: 2			$42.00			Balance: $42.00
TOTAL INVOICES: 2			TOTAL INVOICED: $42.00			Balance: $42.00

This list can be used to reprint a second notice for selected invoices. A more automated process for generating second notices is still planned for some time in the future.

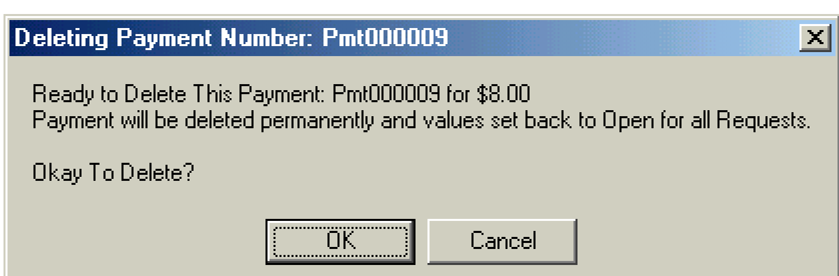
Deleting an Invoice - Local Billing Grid

If you click once in the **LocalInvoice column** of the Local Billing Grid, the **To Pmts** button will appear just above the Grid. Use this button both to delete (or post) payments and to delete the Invoice listed in the LocalInvoice column. **If there is a payment posted to the Invoice, you must first delete the payment before deleting the Invoice**.

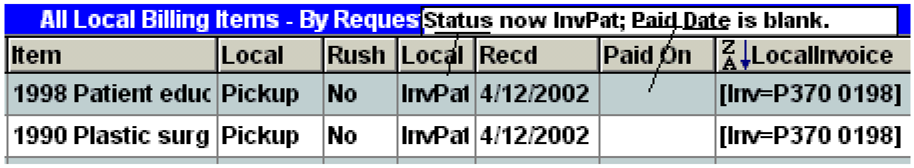
A **Payments From Patrons, Depts Form** for an Invoice that has already been paid will look like this:



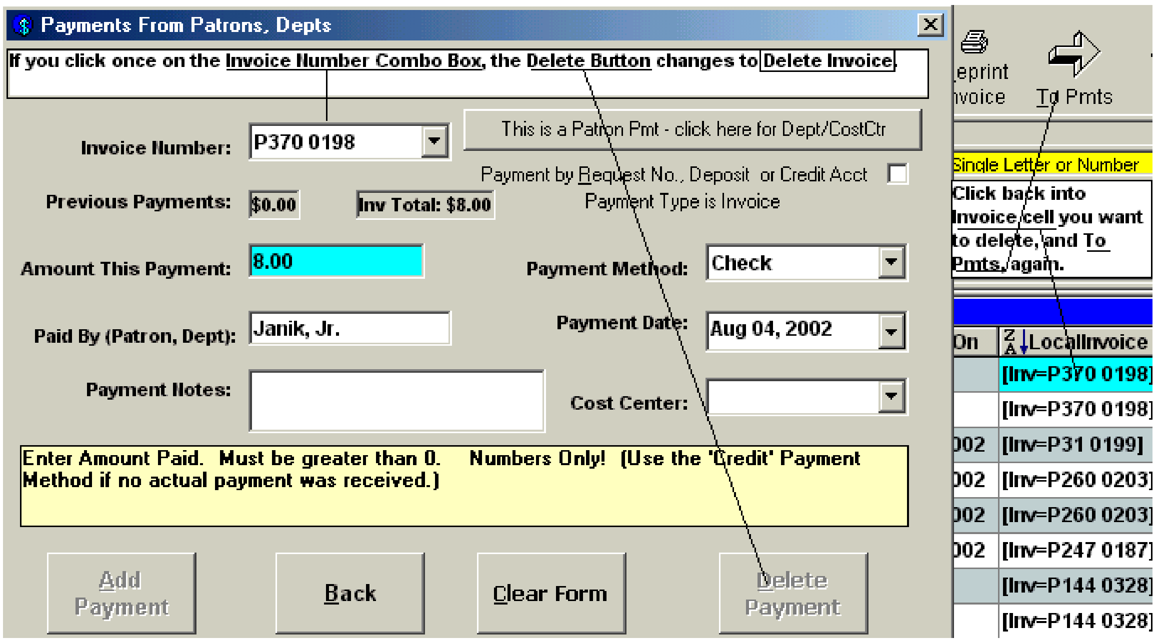
First delete the Payment by clicking the **Delete Payment button**. This will produce the usual Message Box asking if you are sure:



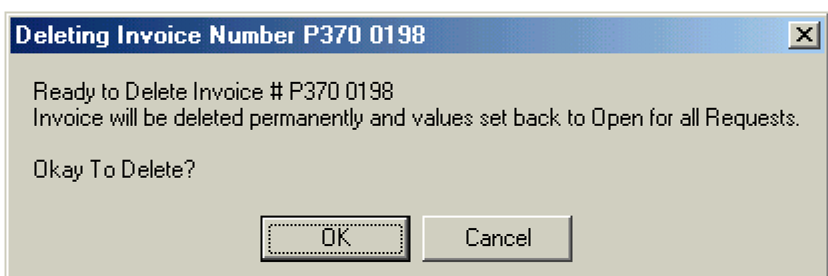
When you click Ok, the payment is deleted and the affected items in the Grid are returned to Invoiced status.



At this point we are now ready to delete the Invoice itself. Click back into a LocalInvoice cell that contains the Invoice we want to delete. Then click **To Pmts** again. The Payments From Patrons, Depts Form returns.



If the Delete Button still reads "Delete Payment," click once on the **Invoice Number Combo Box**. The button will change to "Delete Invoice" and will be enabled. After you click the **Delete Invoice Button**, you'll get the "Are You Sure?" Message Box.



If you click Ok, the Invoice will be deleted from the appropriate Invoices Table, all items in the Grid for that Invoice will be reset back to Received, and the LocalInvoice value will be blank.

Rerun a batch of Local Invoices

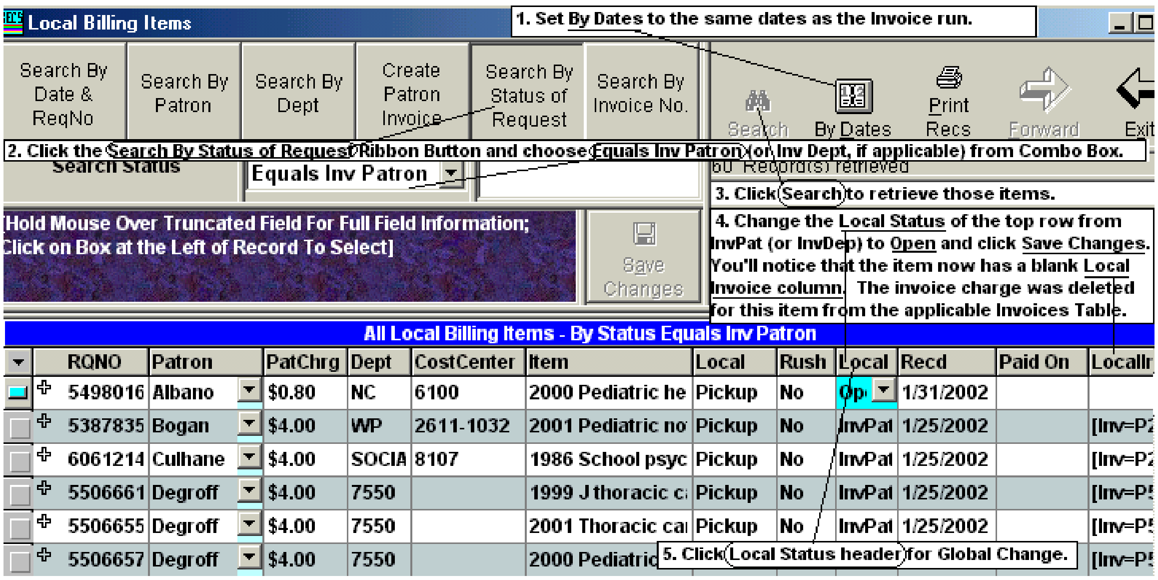
You can **Rerun a batch of Patron, Department or Cost Center Invoices just printed** by using the Global Change function on the Local Status column to reset all the invoiced items back to Open. This process will also remove each item from either the **Patron or Department Invoices Table**, depending upon the type of Invoice printed, and **delete each invoice** when all of its items have been deleted.

Deleting a batch of Local Invoices

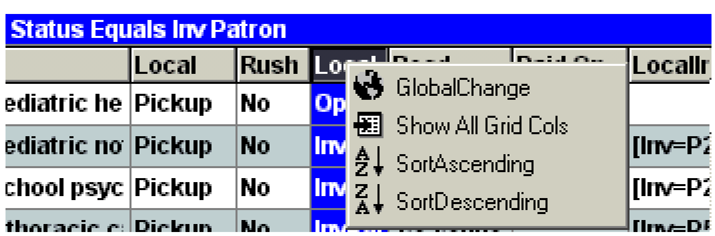
Sometimes, perhaps as a result of a paper jam or some other infelicity during an Invoice run, the run is interrupted and, while the changes are made to the database, not all the Invoices are printed. You have two choices to rectify this situation.

1. If only a few invoices remain unprinted, use the Local Billing Grid and **Reprint Invoice** for each of those missing.
2. If more than a few are unprinted, your best bet is to **delete the Invoice Batch entirely** and rerun from scratch.

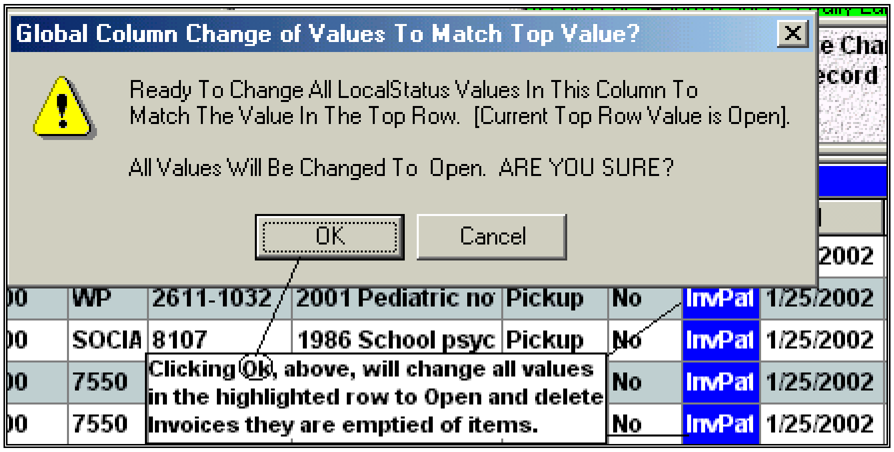
The steps for deleting a batch of Invoices just run are illustrated below.



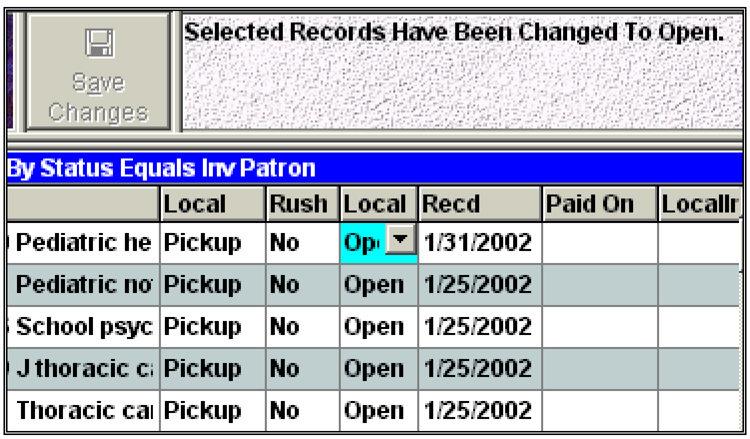
1. **Set the Dates** to the same dates for which the batch of invoices was run.
2. Click the **Search By Status** Ribbon Button and choose **Equals Inv Patron or Inv Dept**.
3. Click **Search** to retrieve those items.
4. **Change the Local Status of the top row** from **InvPat** (or **InvDep**) to **Open** and click **Save Changes**. This step will also remove the charge for that item from the Invoice Record in the appropriate Invoices Table (**tblPatInvoices** or **tblDepInvoices**).
5. Click the **header on the Local Status Column** to get the **Header Context Menu**.



6. Click **Global Change**. This will select all the items in that column for change.
7. Click **Ok** at the message about changing all values to Open.



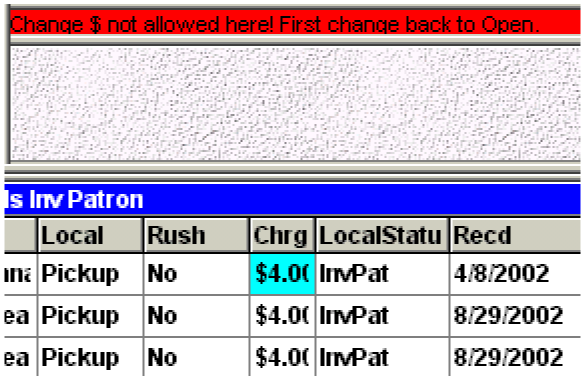
8. Local Status will be changed back to Open for all; **All Invoices from that run will be batch deleted from tblPatInvoices (or tblDepInvoices)** once all the Invoice's items have been reset back to Open; the **LocalInvoice column will be cleared**; and these items will now be eligible for a new Invoice run on the Local Billing menu.



N.B. The new batch of Invoices will begin with the **next Local Invoice Number** after the last number of the deleted batch; the numbers will not be reset. In most cases this sequential number won't matter, but if you were using it to guage the number of Invoices printed within a certain time period, for example, that number would not be accurate after using the method above.

Changing Local Charge after Invoice not allowed

Once an invoice is printed, Patron, Department or Cost Center Report, you'll get an error message ("**Change $ not allowed here! First change back to Open**") if you try to change the charge field. In the case below, we tried to change the $4.00 charge to $5.00:



The same will occur if the Status were InvDep. To reset the charge (assuming you haven't already sent out the Invoice), go to the Local Billing Grid (if you're not already there), Delete the Invoice (see above), change the charge and re-run the Invoice for that Patron.

Invoice Troubleshooting

Box at the top, where the Return Address, etc., should be, is empty.

First check under '**Setup**' and '**Billing Setup**' on the Menu Bar, to be sure you have values entered for the return address, etc. If these values are there (and they appear in Print Preview but not on the actual printout), then the **missing Invoice return address** values are probably the result of a layering mismatch when your printer prints the page. This seems to work for HP printers with the problem, and may wprk with others:

1. Click **Start,** then **Settings**, then **Printers** on the Win9x desktop.
2. Right-click your default printer and choose '**Properties**'.
3. Click the '**Graphics**' Tab to show the Graphics info form.

In the box at the bottom you have a choice of '**Graphics Mode**' with two option buttons: Raster Graphics and Vector Graphics. The 'What's This?' help for Vector Graphics reads:

Controls how the printing information is rendered by your printer. Using Vector Graphics can significantly increase printing speed. However, if you have problems, *such as incorrect overlaying*, trying choosing Raster Graphics.

[Italics added.] "Incorrect overlaying..." sounds about right. When we changed from Vector Graphics to Raster Graphics on our HP5, the address and other data miraculously appeared.

If all else fails, though, simply check the **Suppress Invoice Box** checkbox on the **Billing Setup** form.

It's easy enough to sacrifice the fancy box, if it obscures what lies within. Once you've registered this choice, the Invoice will be printed without the surrounding box.

Local Payments

Payments can be made using a variety of **Payment Methods** and **Payment Types**.

Local Payment Methods

These appear in a Dropdown Combo Box on the Payment Information Form, and include the usual methods of payment: **AMEX**, **Cash**, **Check**, **Credit**, **EFTS**, **IFM**, **Invoice**, **MasterCard**, **Other, Transfer, Visa** and others. Some of these payment methods aren't applicable to Local Transactions (EFTS and IFM, for example), but since the Payment Methods Table is used in both Borrowing and Lending, they appear as choices anyway.

The **Payment Methods Table** is crucial to much of the database work, so please don't discard this Table (it has happened once or twice in the past). As with any necessary table, the absence of this table will interfere with normal QuickDOC processing. If you have to re-create the tblPmtMethods Table, the default values are as follows:

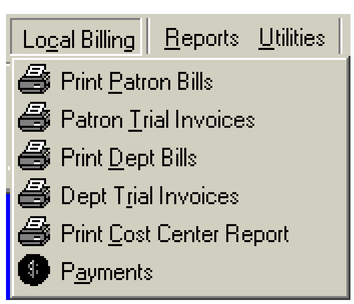
1. AMEX
2. Cash
3. Check
4. Credit (non-cash credit for an item)
5. EFTS (not usually a Local payment choice)
6. IFM (not usually a Local payment choice)
7. Invoice
8. MasterCard
9. Other
10. Transfer
11. Visa
12. Deposit Acct.
13. Request (by Request Number)

Payment Types (Local Patron/Dept)

These include:

1. Invoice
2. Credit (non-cash credit for an item---better to use a "Free Number Before Charge" type Profile)
3. Deposit Acct.
4. Request (by Request Number)
5. Other

Payments of all types may be made using the **Local Billing Menu Bar choice, Payments**.



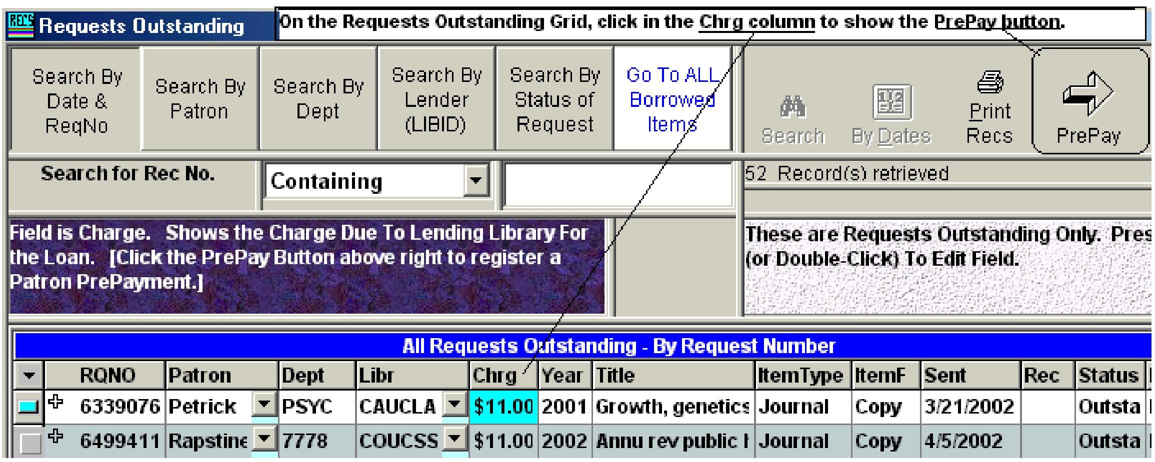
Payments are also commonly made on the **Local Billing Grid**, going directly to the Local Payments Form from the Grid item to be paid. Some payments (**Pre-paid items** and **Quick Pay Local Payments**) can also be made directly on the **Requests Outstanding** and **Borrow Item Backfile** Grids.

Pre-payments on the Requests Outstanding Grid

In many cases, Libraries will require Patrons to **Pre-Pay** for items to be ordered. Typically, this will be a fixed charge per item, although it can be set up in many different ways. In QuickDOC, requests that are Pre-Paid will be **automatically set to PaidPt when they are checked in as Received**.

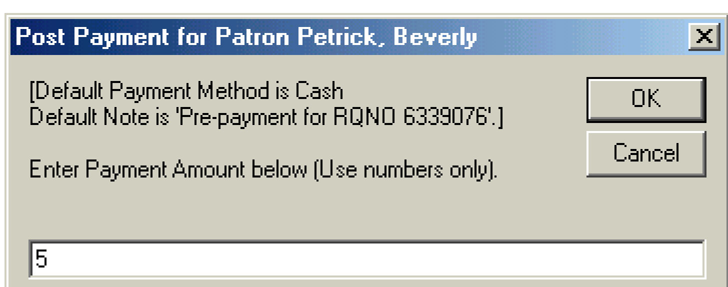
If the Patron pays up front, you will have the necessary information at the time the request is sent in QDPortal. Once all requests are sent, click the **Import QDPortal** Tool Bar button in QuickDOC to bring the new items into the Requests Outstanding Grid. To put today's requests at the top, click the header of the **Sent Column** and choose **Sort Descending**.

For each item you want to **Pre-Pay**, click the **Chrg Column** for that item; a **PrePay Button** will appear to the upper right:



If you click Pre-Pay, an Input Box will appear, noting the following Default Values that will be associated with the Payment:

1. The **Default Local Payment Method** will be whatever has been set for your Local Payments (this is currently set to the last Payment Method chosen when a payment was recorded in Local Billing).
2. The **Default Payment Note** will always be '**Pre-payment for RQNO** nnnnnnnn'; this note field is used later to match up the payment when the item is Received, so it's necessary that it should remain in that format.

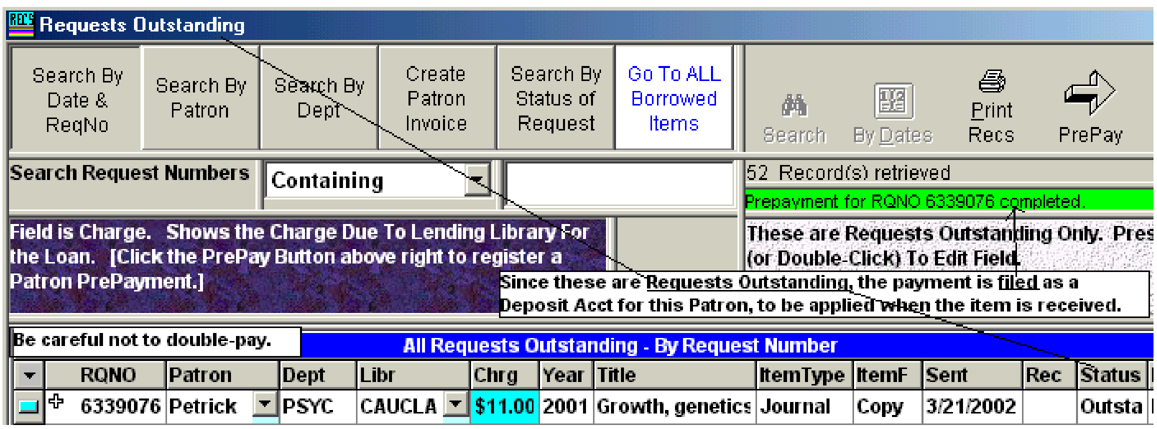


In order to **prevent duplicate Patron Pre-payments**, a lookup is made before the payment is filed. If an earlier Pre-payment is found, a Message Box explains:

If the pre-payment isn't a duplicate, it's filed in the **Deposit Account Table for Patrons** (**tblPatDeposits**), with a matching entry in the gatekeeper Table, **tblPatCredits**---tblPatCredits is checked first on any search to see if the Patron involved has a balance of **any** kind (either a real Deposit or a vague Credit, but steer clear of vague Credits if you can; a Local Charge Profile with a certain number of 'Free Items Before Charging Begins' is a much easier way to manage this).

As far as QuickDOC is concerned, Deposit Accounts and Payment Accounts are tracking real money, so that various comparative reports should be possible. Once the vague 'Oh, give a credit for this' mindset intrudes, then accountability is out the window. Think Enron.

Since the prepayment is held in abeyance until the item is received, you won't notice any obvious change in the grid (other than a small notice in green that '**Prepayment for RQNO 6339076 completed**' in the box beneath the **Records Retrieved** box).



At this point it's just waiting for the Outstanding Request to be checked in as Received.

An **Outstanding** item is changed to **Received** in a variety of ways. It can be changed by clicking the Mark Rec'd Button on the Requests Outstanding Grid; it can be Received by changing its status from Outstanding to Received in the Requests Outstanding Grid; it can also be changed to Received as a part of a Global Change of requests from [whatever] to Received. Loansome Docs that are filled in-house are changed from Outstanding to Received automatically upon import of the action taken on DOCLINE.

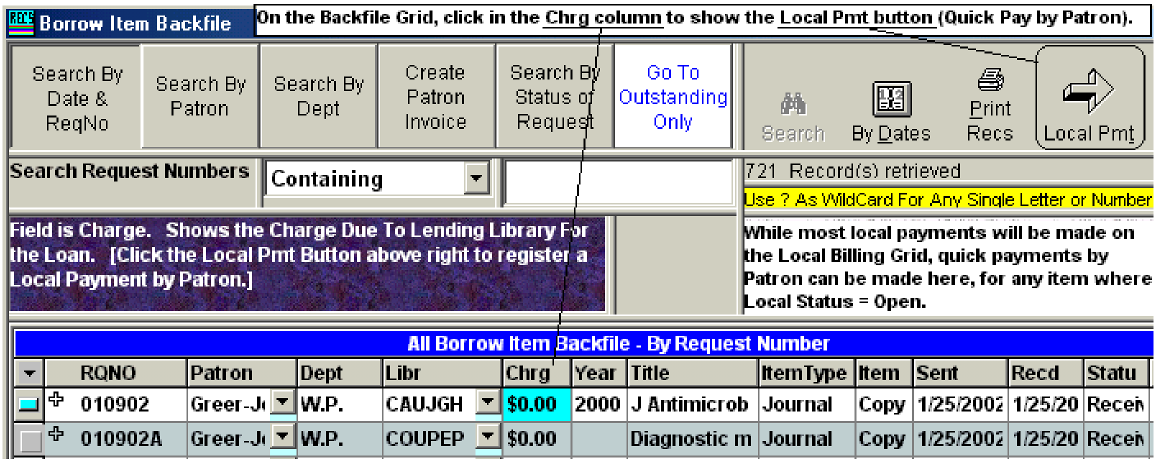
In the course of changing an item from Outstanding to Received, by any of the above methods, a check is made to see if there is a balance for this Patron in tblPatCredits. If there is, then a search of the **tblPatPayments Table** is performed, to see if this item has been Pre-Paid (the **PatPaymentNote** field will contain a "Pre-payment for RQNO 6339076" note for that Request Number).

If a pre-payment is found, the charge being held in tblPatDeposits is assigned to the Request Number it's being held for (6339076, in the above example), a debit entry is made in both tblPatDeposits and tblPatCredits, and the item's **Local Status is changed to PaidPt** and the original **Local Date Paid** is assigned the original date of the pre-payment.

Local Payments Made from the Borrow Items Backfile Grid (Quick Pay)

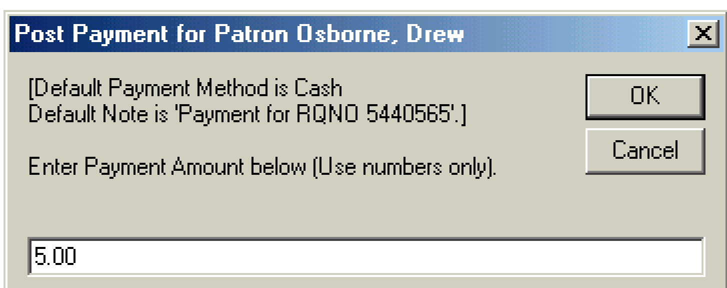
In addition to the ability to Pre-Pay an item while it's still Outstanding, it will also be useful at times to be able to post a quick payment directly on the Borrow Item Backfile Grid, without having to exit and fire up the Local Billing Grid. This process is similar to the Pre-Pay process, and uses similar defaults to record the payment.

For each item you want to **Quick Pay**, click the **Chrg Column** for that item; a **Local Pmt Button** will appear to the upper right:

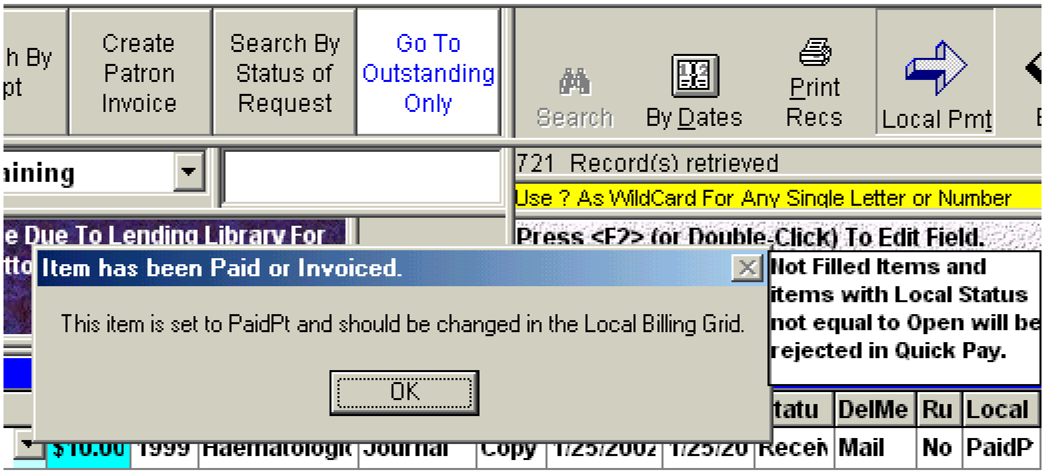


If you click Local Pmt, an Input Box will appear, noting the following Default Values that will be associated with the Payment:

1. The **Default Local Payment Method** will be whatever has been set for your Local Payments (this is currently set to the last Payment Method chosen when a payment was recorded in Local Billing).
2. The **Default Payment Note** will always be '**Pre-payment for RQNO** nnnnnnnn'; this note field is used later to match up the payment when the item is Received, so it's necessary that it should remain in that format.

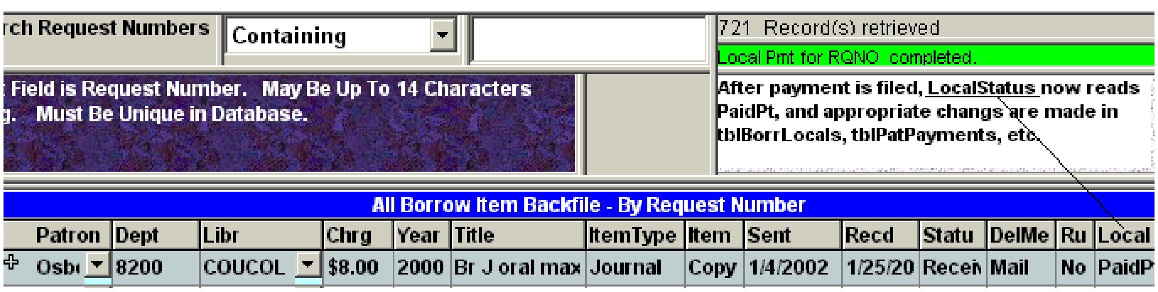


Local Status must be Open for Quick Pay. If you attempt to Quick Pay an item that has a Local Status of anything but Open, the payment will be aborted.



Once the Quick Pay is posted, the values describing the payment are filed in the **tblPatPayments Table**, with a **unique Payment Number** (in the form **Pmt000nnn**), a **PatPaymentInvoice** value equal to the Request Number, a **PatPaymentAmount** of whatever was entered in the Input Box, a **PatPaymentDate** of Today, a **PatPaymentNote** in the format 'Payment for RQNO 5440565', a **PatPaymentType** of 'Request', a **PatPaymentMethod** of whatever was your default (Cash, in the case above), and a **PatPaymentCostCenter**, if one was filed with that request.

Because this transaction is complete, other changes are also made in the **Local Status** (it's changed to **PaidPt** in both **tblBorrowItems** and **tblBorrLocals**), and to the **LocalDTPD** and **LocalInvoice** fields of **tblBorrLocals** (Today's Date for Date Paid, and the Payment Number for Local Invoice. Because we're doing this on the Borrow Item Backfile Grid, you will notice that Grid's change of Local Status immediately.

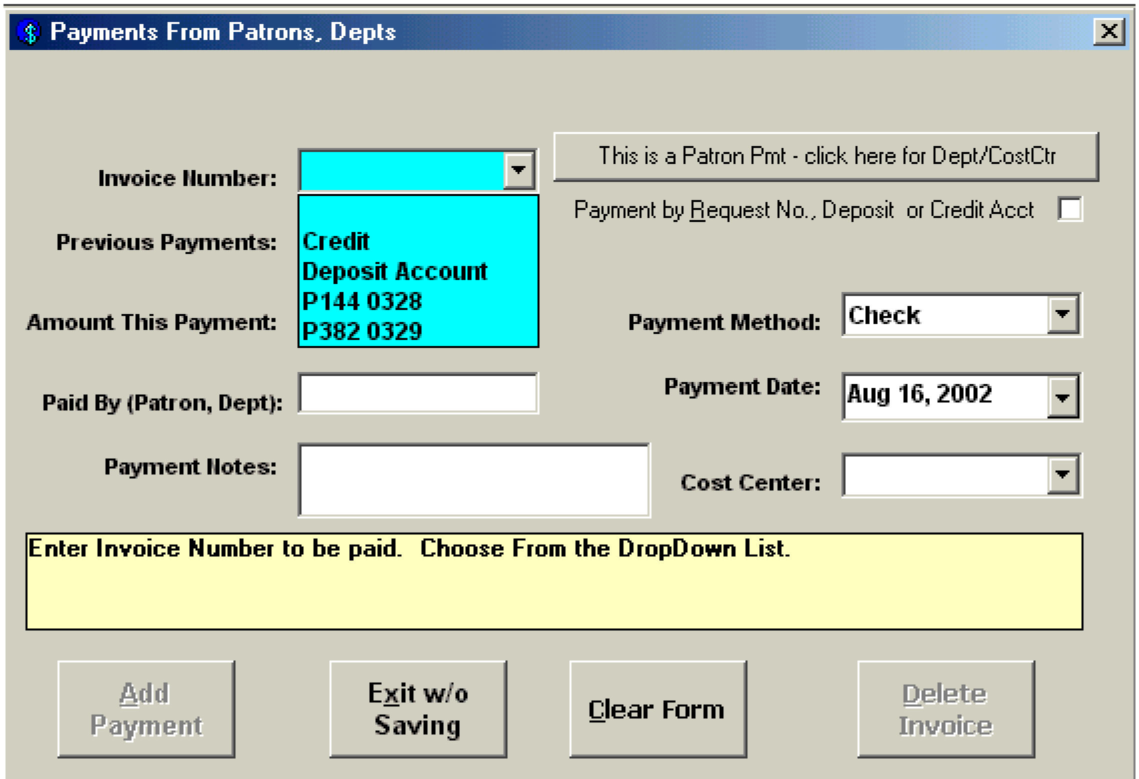


The green notice box also informs you that the posting was successful.

Local Payments By Invoice Number

From the Local Billing Menu Bar Choice

Patron Payment By Invoice Number is the default when arriving for **Payments from the Local Billing Menu**. All unpaid Patron Invoices (along with choices for **Deposit Account** and **Credit**) are listed in the **Invoice Number Dropdown Combo Box**.

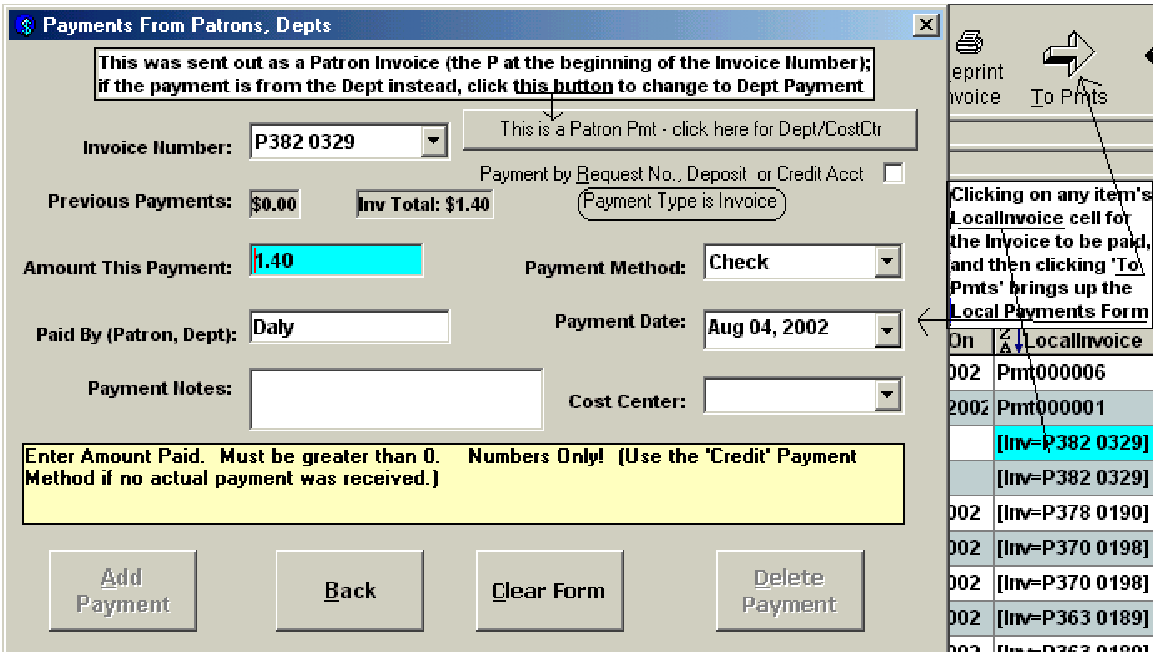


Click the **This is a Patron Pmt** button to change it to **This is a Dept/Cost Ctr Pmt** to register a payment by a Department, and to fill the Invoice Number Combo Box with a List of Department or Cost Center, not Patron, Invoices.

If you start typing in the **Invoice Number Combo Box** (and type at the rate of about a letter every .5 second or so), the box will open up at the sixth letter typed to the spot on the **Invoice List** where that Patron's (or Department's) invoices begin (or close to it). Choosing the invoice and moving to the next field (either by pressing ENTER or clicking on it) automatically fills in most of the form: the **Paid By** (Patron, Dept) field, the **Payment Amount** (as a default equal to either the Invoice Total or the Invoice Total less any previous payments, if there were any), the **Payment Date** (today), the **Primary Cost Center** (if there is one) and a default for **Payment Method** (Check). Any of these can be changed, as needed.

From the Invoice column on the Local Billing Grid

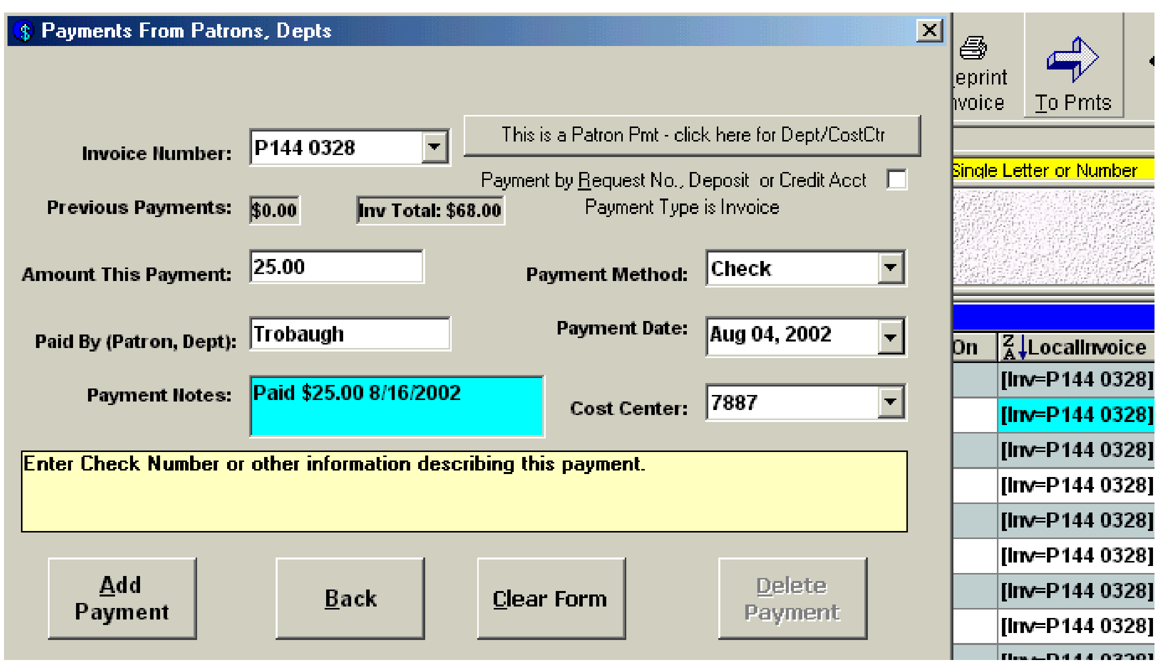
You can also **pay an Invoice from the Local Billing Grid**, by clicking on the Invoice to pay in the Grid's **LocalInvoice column** and then the **'To Pmts'** button. This is sometimes faster if the Grid is open anyway, and it will automatically locate the Invoice information you want.



Since we’ve come from the Local Billing Grid, and the Invoice Number we want has already been selected, most of the payment information has already been filled in and the focus is on the **Amount This Payment** box, with the **Invoice Total amount** entered. If this is a complete payment, just press Enter. The **Add Payment button** will be enabled; make any other changes needed and **click Add Payment** or **press Alt-A** to add it.

Partial Payments on Invoices

Partial payments are filed with the Invoice, but the invoice is left open for future activity. Partial payments are reflected in item activity up to the last full payment for each item. If there isn't enough left over to fully pay the item, it's left marked as "InvPat" or “InvDep" rather than "PaidPt" or “PaidDp" although the full payment amount is applied to the Invoice itself. Here’s an example of a partial payment on a invoice:



After the payment is filed, items on the invoice are marked PaidPt until the amount of the partial payment has been reached.

Local Billing Items With Invoice Containing 0328

Patron	PatChrg	Dept	CostCenter	Item	Local	Rush	Local	Recd	Paid On	LocalInvoice
Troba	$4.00	HEMO	7887	1999 Clinical labo	Pickup	No	PaidP	1/25/2002	8/4/2002	[Inv=P144 0328]
Troba	$4.00	HEMO	7887	1999 Indian J ped	Pickup	No	PaidP	1/25/2002	8/4/2002	[Inv=P144 0328]
Troba	$4.00	HEMO	7887	1999 Molecular m	Pickup	No	PaidP	1/25/2002	8/4/2002	[Inv=P144 0328]
Troba	$4.00	HEMO	7887	1999 Haematolog	Pickup	No	PaidP	1/25/2002	8/4/2002	[Inv=P144 0328]
Troba	$4.00	HEMO	7887	2000 Br J haemat	Pickup	No	PaidP	2/5/2002	8/4/2002	[Inv=P144 0328]
Troba	$4.00	HEMO	7887	1999 Br J haemat	Pickup	No	PaidP	2/5/2002	8/4/2002	[Inv=P144 0328]
Troba	$4.00	HEMO	7210	him	Pickup	No	InvPat	2/8/2002		[Inv=P144 0328]
Troba	$4.00	HEMO	7540	nion	Pickup	No	InvPat	2/8/2002		[Inv=P144 0328]
Troba	$4.00	HEMO		mat	Pickup	No	InvPat	4/10/2002		[Inv=P144 0328]

Payments down to here total $24.00. The remaining Inv items stay at InvPat.

Notice that the payment amount of $25.00 was applied to each request until the charge for the request was greater than the amount left over from the payment (the **requests will be marked paid in chronological order**). The $4.00 charge in the seventh row exceeded the $1.00 left from the $25.00 payment after the top six rows were marked. Since this $1.00 credit remains with the Invoice, it will be fully paid with another payment of $43.00 (even though it may look like they owe $44.00, if you were to total the charges in the remaining InvPat rows of this invoice).

An easy way to check this would be to click the '**Reprint Invoice**' button (click into the [Inv=P144 0328] cells on an **InvPat row** to get the **Reprint Invoice button**; it doesn't show up on a row where the Invoice has been paid), which will result in a reprint of all items items, but with the **Invoice Total: $43.00** at the top (rather than the original $68.00) and at the end, rather than the usual "Total Charges: $68.00" that completes a first invoice, there will be three lines at the end of a Reprint with payments applied:

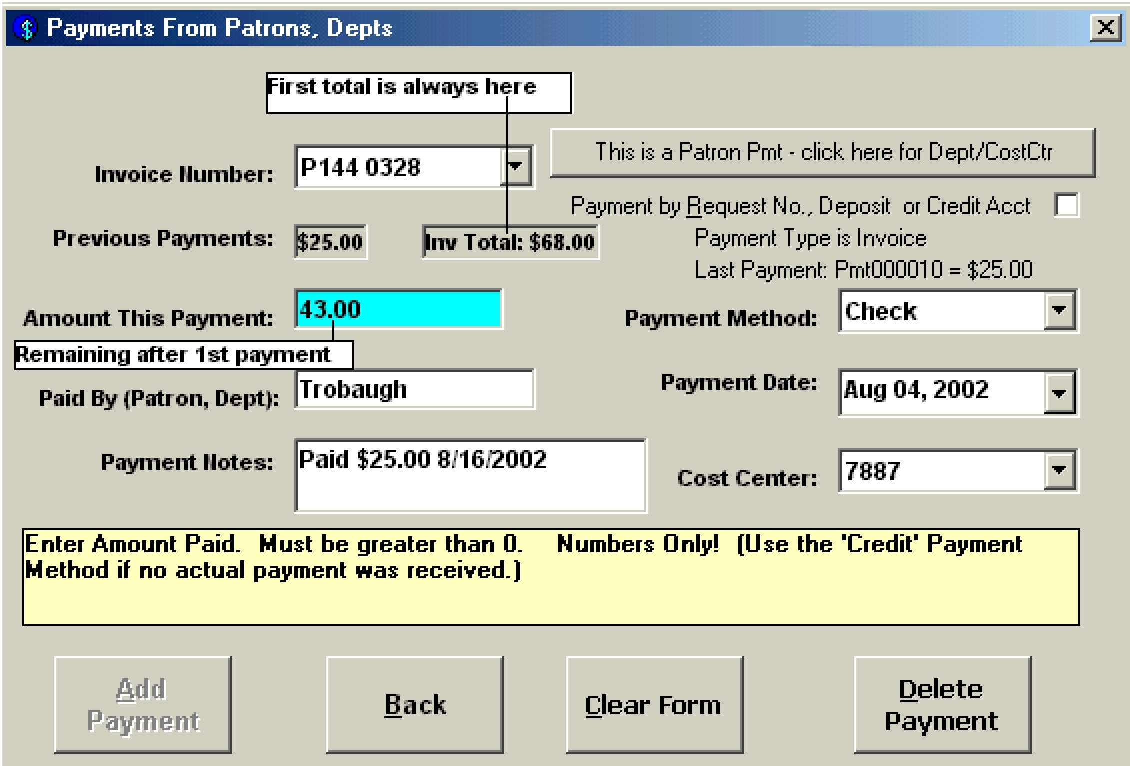
Total Charges: $68.00

Amount Paid: $25.00

Amount Due: $43.00

The **Reprint Invoice button can be used in this way to fire off a quick reminder** of an underpayment, as well as a second notice when there is no payment at all.

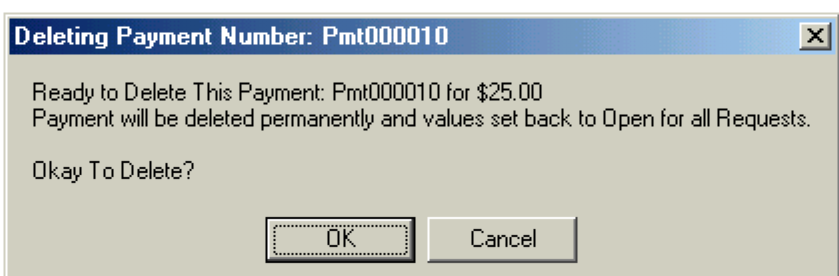
When the final payment is received and the Payment form brought up again to that invoice number, information from the first payment will reappear:



The Payment Note shows the note left with the first payment, for information only, and will be changed when filing this second payment. The '**Add Payment**' button will be enabled once the suggested "43.00" payment amount is accepted (by pressing ENTER or moving to another field) or some other value is entered instead.

Delete Payment made to Invoice

If a previous payment is shown on the Payment Form, it can be deleted and then re-entered by clicking the '**Delete Payment**' button. If more than one payment has been applied to this invoice, the last payment applied is the one queued up for deleting. In the case of the form above, where we're poised to add the final 43.00 payment, clicking 'Delete Payment' brings the previous payment up for possible deletion. Check the Message Box information carefully to be sure the proper payment is being deleted (although it's easy enough to add it back in again if you make a mistake):



It's the previous $25.00 payment, in the case above, that has been queued up for deletion. When a payment is deleted, the Invoice is restored to its previous values, and any requests that had been marked "PaidPt" are reset back to "InvPat."

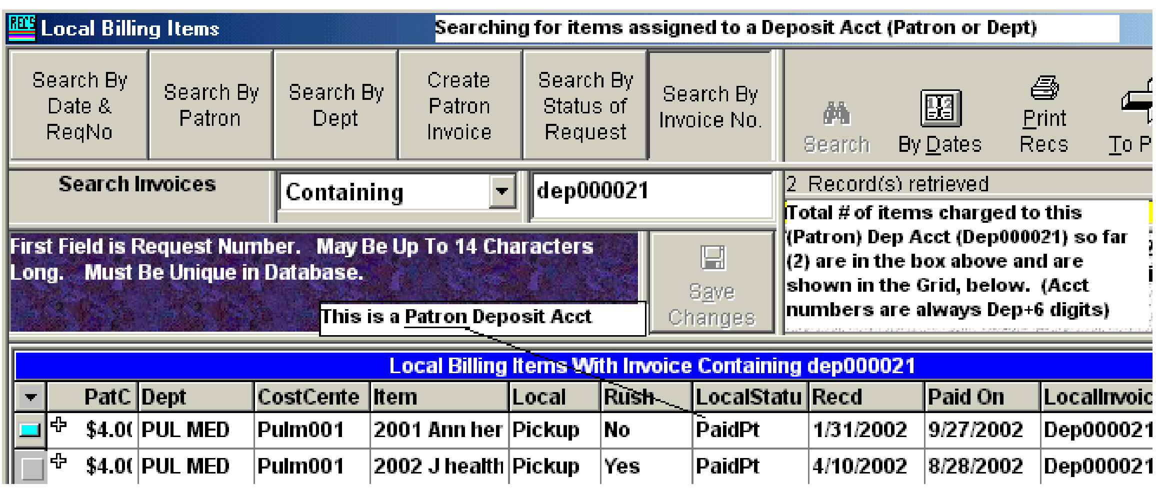
Local Payments By Deposit Account

Use the '**Deposit Account**' choice in the Invoices Dropdown Combo Box on the Payments form to register a payment as a **Deposit Account payment**. Deposit Accounts can be established for both Patrons and Departments. There is no Cost Center Deposit Account, but if a Department Deposit Account includes a specific Cost Center, only items with that specific Cost Center will be deducted.

In the case of **Department Deposit Accounts** (but not Patron Deposit Accounts), right after the payment is added, QuickDOC performs a search to see if there any outstanding items still marked as Received that might be paid from this deposit. The **search goes back six months**, or to the **beginning of the current year**, whichever is longer. It won't alter any items that have already been changed to **InvDep** but it will go ahead and pay off any Received items with a **CHRGAsDept greater than 0.00**.

In the case of **Patron Deposit Accounts**, no automatic payment of Open items is performed, but the PatDeposits Table will always be checked first when you attempt to record a payment for that request.

Items paid from Deposit Accounts are available for searching via the LocalInvoices column of the Local Billing Grid, since notations are made there when items are deducted from a Deposit Account, referencing the Deposit Account number. A search on this field is a quick way to get a list and printout of any items charged to specific Deposit Account:



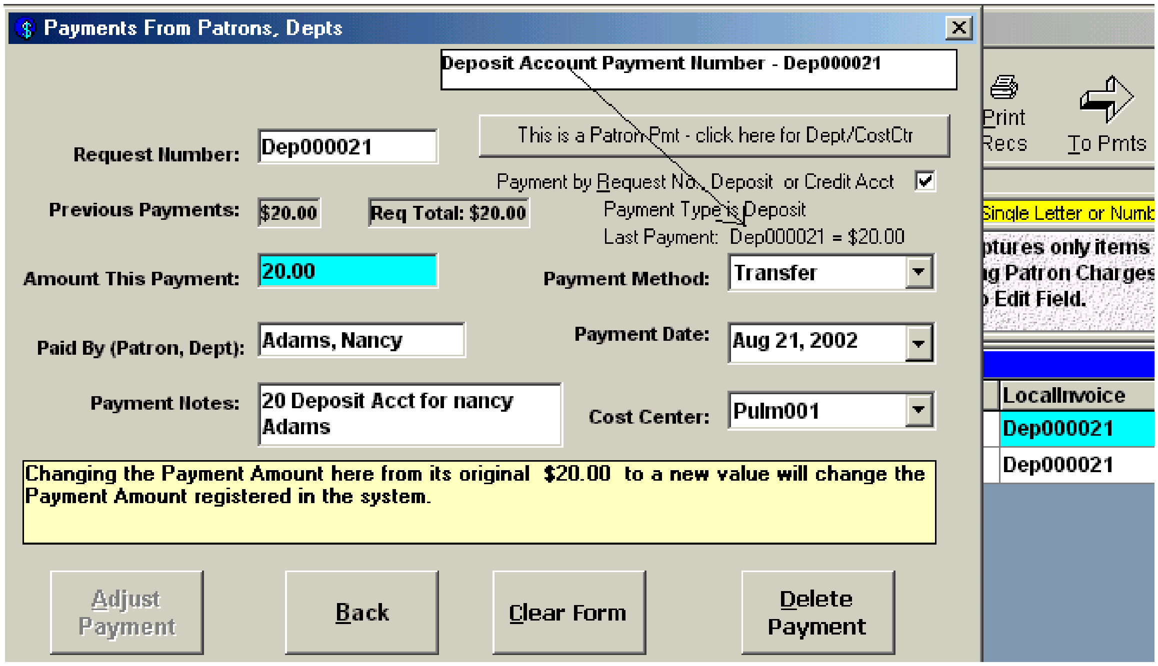
There is also a **table of Deposit Account activity for Patrons (tblPatDeposits) and Departments (tblDepDeposits)**, with individual line items for each activity item. There is no special Cost Center Deposit Account Table; these are kept within the Departments Table.

Department Deposit Acct Auto Payment begins Jan 1 of current year.

After a Department Deposit Acct payment is registered, unpaid Open requests are paid from the **Deposit Account payment beginning** either **six months prior to Today's Date, or at the beginning of the current year, whichever is greater**. This is to prevent this year's Deposit Account payment from being applied to a superannuated request that might have been left at Filled some years previously. You can cause earlier requests (or Patron Requests) to be paid from a Deposit Account by marking them as Paid in the Local Billing Grid. Items changed to **Paid** on the Grid (as well as on the Local Payments Form) are always first checked against a Deposit or Credit Account balance and assigned to that payment if possible.

Delete or Adjust Local Deposit Account Payment.

If a mistake is made when entering a Deposit Account payment, you can **delete or adjust the deposit payment itself** (rather than each item assigned to the account) as follows:



1. Get to the Local Payments Form either from the Local Billing Grid or Local Billing Menu.
2. Check the '**Payment by Request No., Deposit or Credit Acct**' box, if it's unchecked.
3. If the Request Number is in the field, erase that and enter the **Deposit Account payment number** (usually something like Dep000123) in that box instead and press ENTER.
4. Either edit the '**Amount This Payment**' box, or click '**Delete Payment**' to begin again.

Deleting and re-entering is probably the preferred method, in which case all the values of the payment will be new. If you choose to edit the payment amount, only that value will change in the payment record. In both cases, any rollbacks or additions to items paid will be performed on requests affected.

Local Payments By Credit

The **Credit payment** is another choice available in the Invoices Combo Box. While this choice can be used to post a certain credit amount to a Patron or Department, it's recommended that you use the Free Items before Charge type Local Profile instead.

There's no line item table for these events---although there are tables for Patron Credits (**tblPatCredits**) and Department Credits (**tblDepCredits**) that keep just the running total. These are paired off with matching items that can thereby be marked as Paid as they occur. On the Local Billing Grid, the **LocalInvoice column** for these items will have a notation of **CreditPatron** or **CreditDept**, depending upon which type is used.

Items are deducted from the appropriate Credits Table only if there's enough in there for that library to cover the total charge of the request. As with Deposit Accounts, requests paid from the Credits Table are marked Paid automatically, at the time their Local Status is changed to either **PaidPt** or **PaidDp**, using the appropriate CHRGAs Patron or CHRGAsDept. It will be a good idea to make sure that these charges are the correct ones, although incorrect charges can be changed at any time (if a charge is changed on any Grid for an item that has been marked as Paid from a

Credit account, that change will be percolated back into the Credits Table---and Deposits Table for Deposit Accounts---at the time the change is recorded).

If the remainder in the Credit Table is less than the cost of the item, it just sits there, waiting for an item it can cover, and the uncovered item remains marked "Open" and is a candidate for the next Invoice run.

If you choose **Credit as the Local Payment Type** from the dropdown box, also choose **Credit from the Payment Methods combo**. This will be useful later for determining actual cash income (as opposed to barter income) received as a result of internal Document Delivery activity.

This semi-official status of Credit Payments is yet another reason to avoid using them; some confusion will nearly always result.

Credit Payment Type vs. Credit Payment Method

The **Credit Payment Type** appears in the Invoice Combo Box, along with Deposit Account, as a choice along with the list of all unpaid Invoices. The **Credit Payment Method** appears in the Payment Methods Combo List.

If you enter an amount with the **Credit Payment Type**, it will be added to the total available for the Patron or Department making the payment in the appropriate **Credits Table**. The Payment Method might be Check or AMEX or Transfer or whatever (even Credit, although this choice will cause the inference that no funds actually changed hands). If you use the **Credit Payment Method** with a Payment Type other than Credit, the payment will be applied to the Request or Invoice cited, but no change will be made to the balance, if any, in the related **Credits Table**. **If there is real money changing hands, always use the Deposit Account Method rather than the Credit Method**.

Delete or Adjust Local Credit Account Payment.

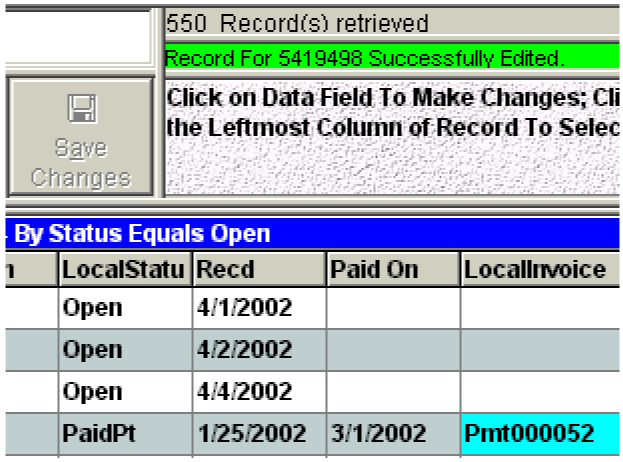
Deleting and re-entering is absolutely the preferred method for editing credits, in which case all the values of the payment will be new. If you choose to edit the payment amount, only that value will change in the payment record. In both cases, any rollbacks or additions to items paid will be performed on requests affected.

Local Payments By Request Number

Payments by Request Number can be recorded on the Local Payments Form, **from the Local Billing menu**, by clicking on the "**single Request Number**" check box and typing in the Request Number itself, but it's a bit easier to do it **from the Local Billing Grid**. Click on the row with the item to be paid in the Grid, and then click the '**To Pmts**' button on the upper right. This will bring up the Payments Form with the Request information already filled in. Choose the appropriate Payment Method and amount, etc., then click '**Add Payment**' to save. The Payment Number assigned will be available in the Invoice column of the Local Billing Grid.

Marking an item as Paid in the Local Status column of Local Billing Grid

You can record a quick **payment by changing the Local Status column on the Local Billing Grid** directly, editing it from Open to either **PaidPt** (for Patron Payment) or **PaidDp** (for Department or Cost Center Payment). The '**Paid On**' column will be changed automatically to Today's Date, if left blank, or it can also be changed before filing---using either the calendar dropdown or by entering the date correctly---to the correct date for that payment. Requests marked as Paid in this way have no other supporting information (no Check Number in Notes, no specific Payment information). A payment entry is recorded, though, with the Request Number as identifier, **Payment Method** will be your **Default Payment Method** and the Payment Amount will be equal to the Request Charge. The **Payment Type** is "**Request**." It is also assigned a **Payment Number**, which will appear in the Local Invoice Column of the Local Billing Grid:



Items marked as Paid in this fashion are still run by the Credits and Deposits Tables, to see whether the amounts should be deducted from these totals, but no other checks are made. The **Default Payment Method** may be a real payment or a credit; since there's no way to tell for sure, it's assumed to be a true payment.

Any payment can be edited later to correct payment amounts only, or simply deleted and re-posted to correct any and all values.

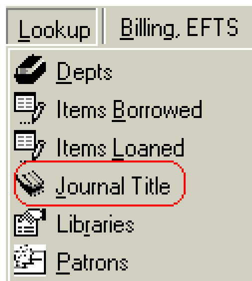
Journals

Records for Journals are held in the QuickDOC.MDB database in the **tblJrnls** Table; there's also an associated **tblHoldings** Table (for **Library Holdings**) but the input and edit forms for this table aren't implemented as of May 2002. It is planned at some point to update holdings lists automatically from **SERHOLD**. The list of Journal records is accessible on the **Add/Edit Journals Form**, either from the Menu Bar or from the Title column in either the Borrow or Loan Grids.

Lookup Journal Title

Displaying Journals from the Lookup Menu

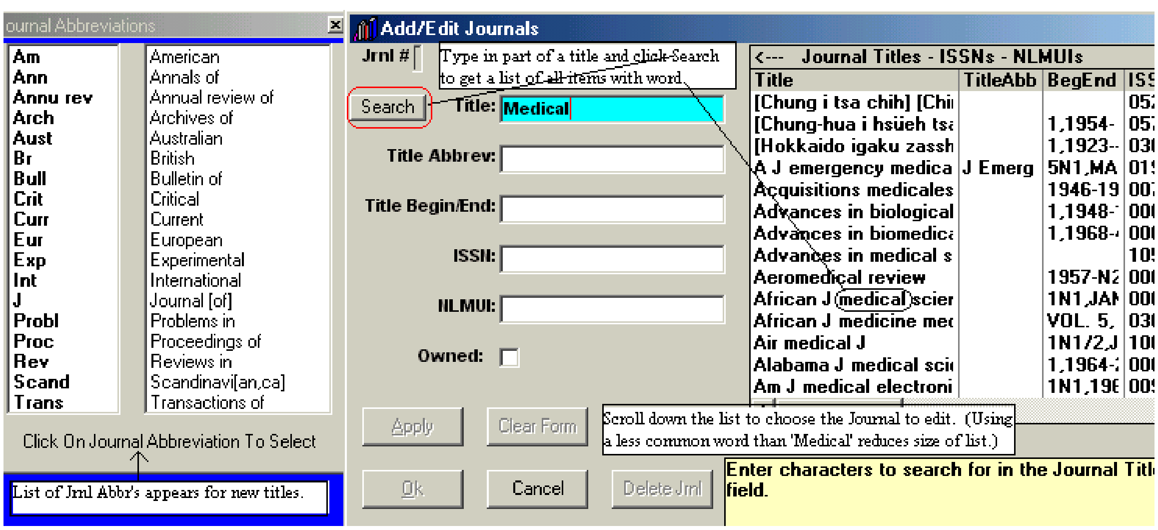
Records for Journals can be displayed from the **Lookup** choice on the **Menu Bar**, under Journal Title.



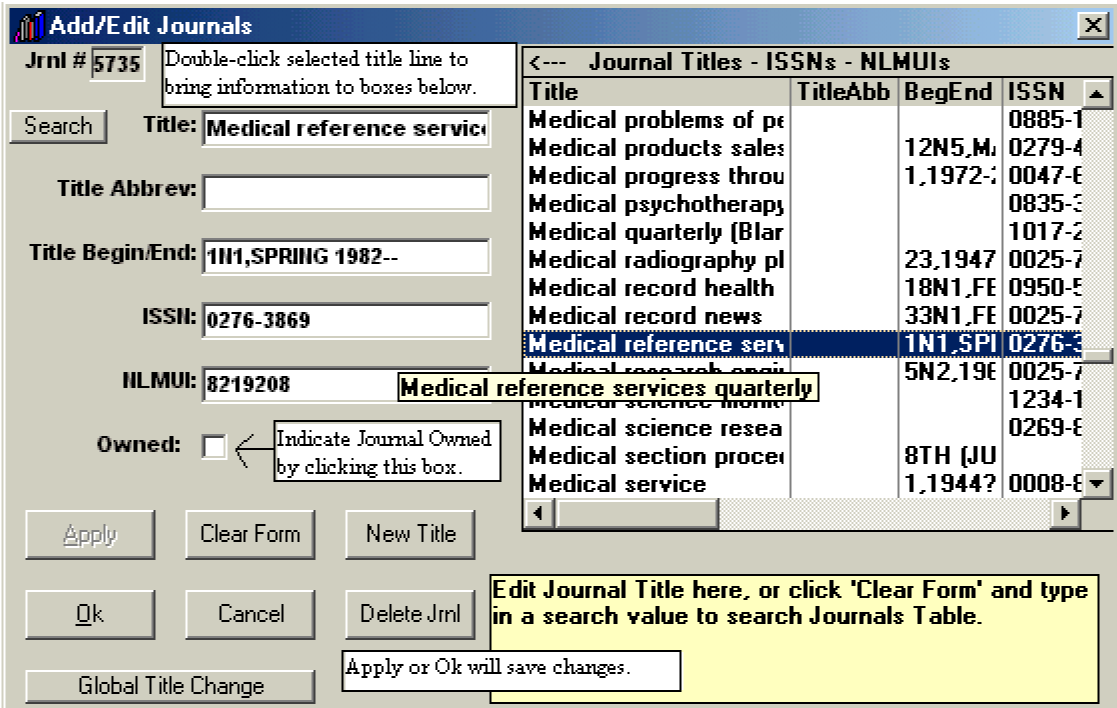
This brings you to the AddEdit Journals Form. Journals can be chosen for editing by using the Search button next to the Title box (for **Journal Title searches**) or the Search button that will appear next to the ISSN box when that box gets focus (for **Journal ISSN searches**).

Searching for a Journal Title

The example below reflects a search when the word "Medical" is typed into the Title box and the Search button is clicked:



Since “Medical” is a fairly common word in our Journal Titles List, it will be wiser to choose some less common word, but even with a fairly long list it is possible to use the scroll bar on the right to scroll down yo the title you want to edit. Double-click on the title you want to move its values to the edit boxes.



Editing Journals

In the case above, we can make such changes as necessary in the record for *Medical Reference Services Quarterly* and then use the **Apply** or **Ok** buttons to save them. The vertical scroll bar at the bottom of the Journal Titles List can be scrolled right to expose the NLM UI and Title Owned columns.

Sorting the Journal Titles List

You can sort the Title, ISSN or NLM UI columns in ascending or descending order by clicking on the header at the top of the column.

To **reset the Journal Titles List** after a search to its full number of entries, click the Clear button and type in another search value.

Deleting Journals

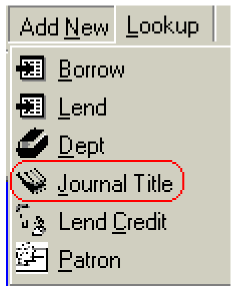
Highlight a Journal Title to delete and click the **Delete Jrnl button** to delete a Journal Title from the Journals Table. If the title has activity in one of the other tables you won’t be able to delete it without first assigning its items to another Journal Record using the **Global Title Change button**.

Adding Journal Titles

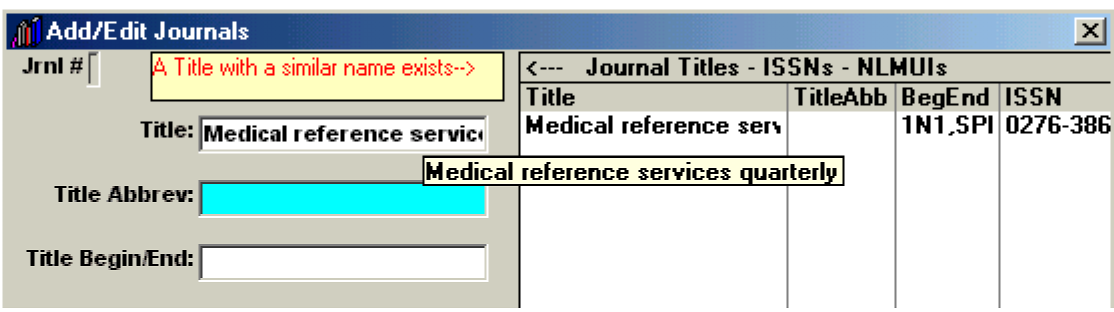
Journal Titles are added automatically if they are part of a DOCLINE Borrow transaction and are not already in the Journals Table of the QuickDOC.MDB database. They can also be added manually using the Add/Edit Journals Form.

Add Journals

Records for Journals can be added from the **Add New** choice on the **Menu Bar**, under Journal Title.

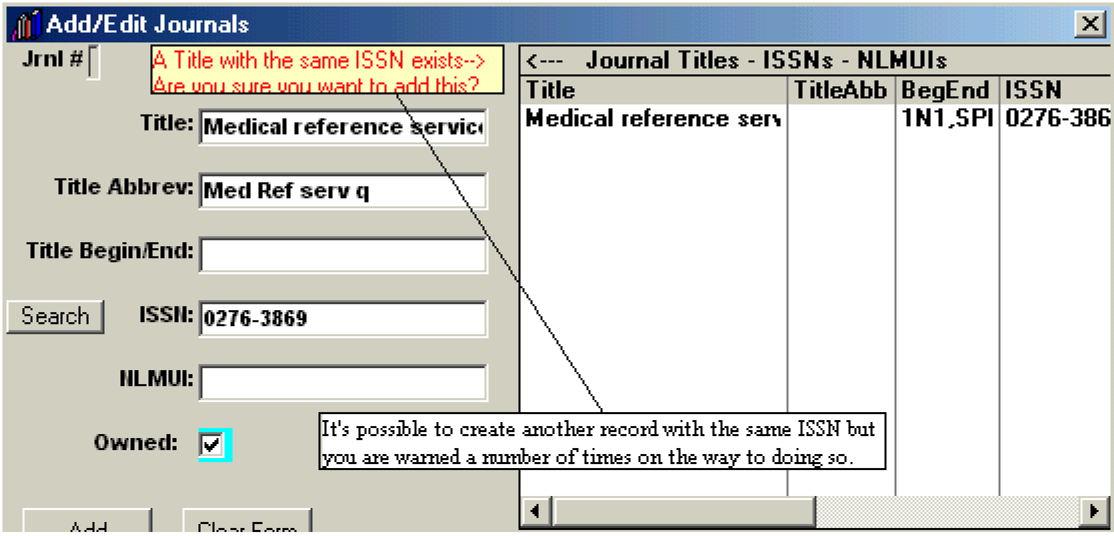


The Add Journals form is the same as the Edit Journals form, except for the **automatic checks for duplicate values in the Title, ISSN and NLMUI text boxes.** After you enter a value in any of these fields, a search is made for matches in the database, in order to prevent duplicate records being added.

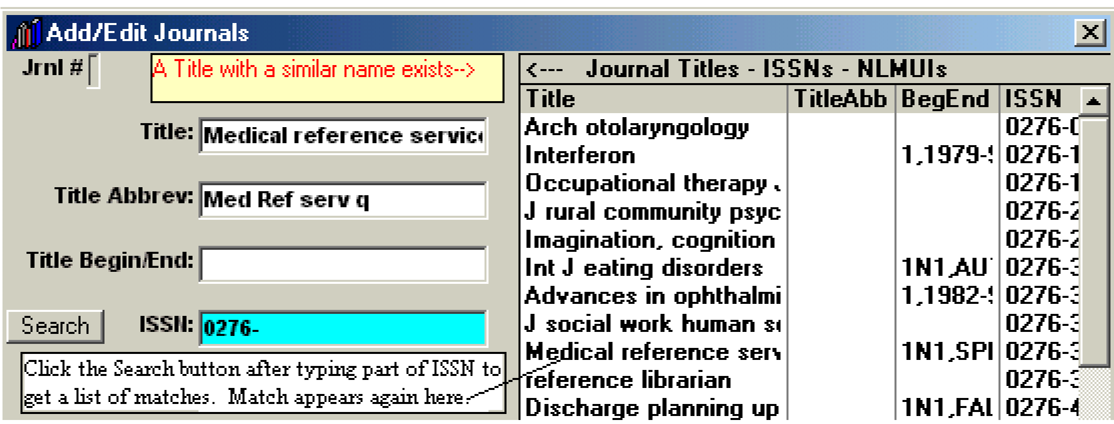


After pressing Enter in the Title box, a quick search is made in the database to identify any similar Journal Titles. If one is found it is displayed in the list on the right. You can double-click on that record line to edit that record and abort the add.

A similar search occurs after data is typed in the ISSN box:



You can also use the Search Button next to the ISSN box to do a search on a partial ISSN, in order to check for an earlier entry:



Again, while it's possible to add two records with the same ISSN, it isn't usually recommended, since the whole point of the Journals Table is to ensure discrete, appropriate assignment of transactions to the appropriate Journal Title involved.

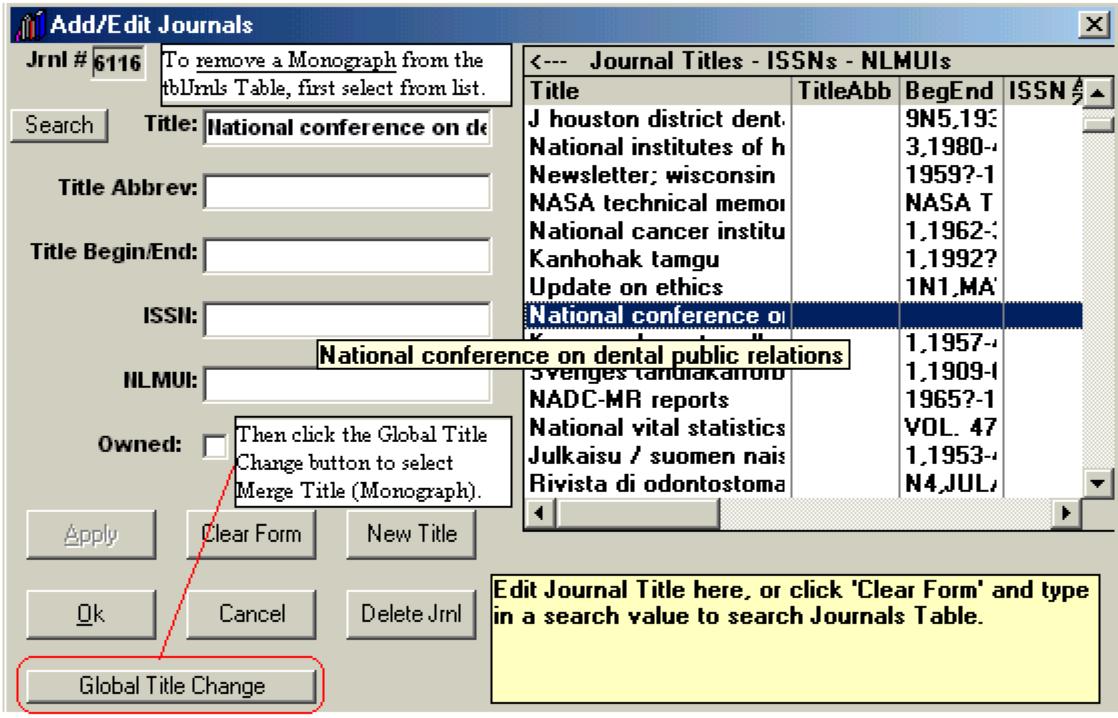
Transferring Journal Activity

To transfer activity from one Journal record to another, use the **Global Title Change** button at the bottom of the form. This method can be used for moving activity from any Journal Title record to another, but it's very useful also in removing Monograph Records from the Journals Table that have been added there incorrectly during a DOCLINE Import.

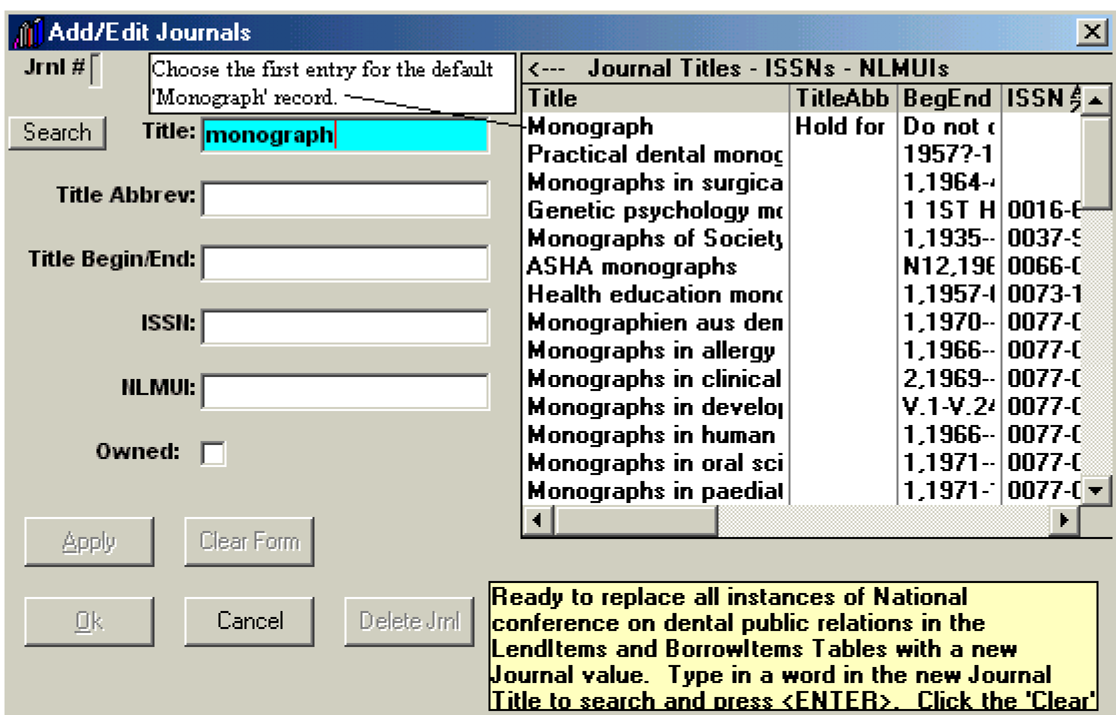
Using Global Title Change to Remove Monographs from tblJrnls

If you discover a monograph title in the list of Journal Titles, you can use the following method to change all Borrow and Loan activity to the **default Monograph record** (usually 9097) and also remove the monograph title from the Journals Table. Use the following steps:

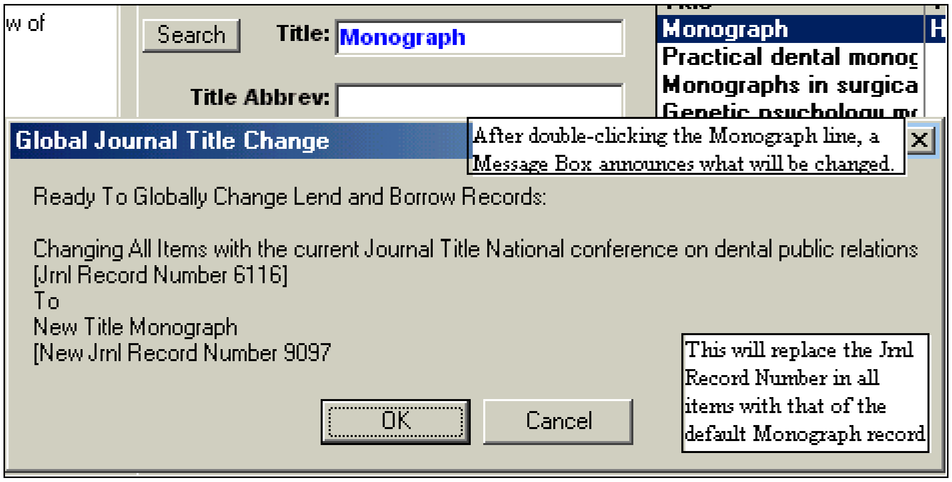
7. First find the monograph record you want to remove, as below, and double-click that entry to put it into the Edit box. Click Global Title Change.



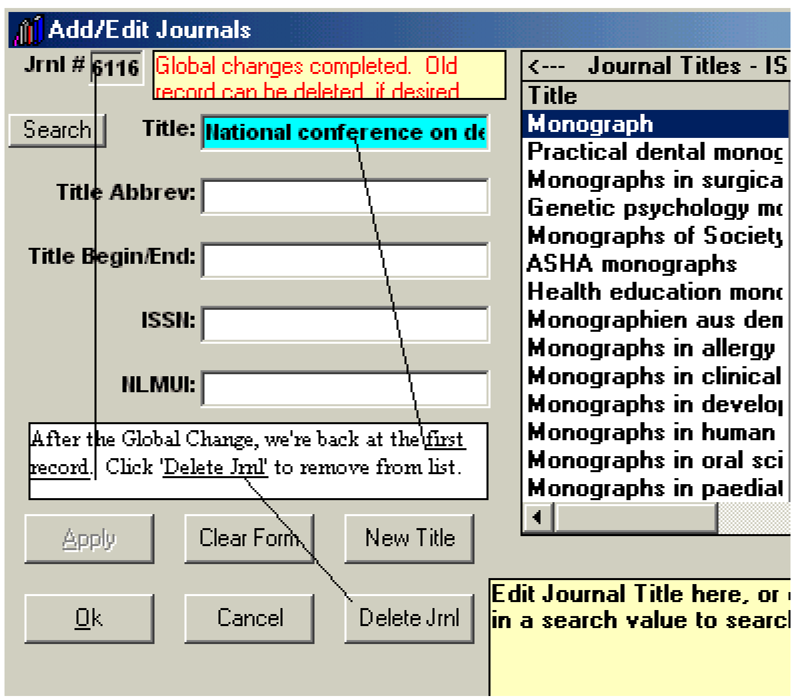
8. Since we want this to be filed as a monograph, we need to choose the record we want to replace the current record with, which in this case is the default monograph record. Enter monograph in the Title Box and press Enter. This gets everything with monograph in the title, including the Default record. Double-click on that first line to choose it.



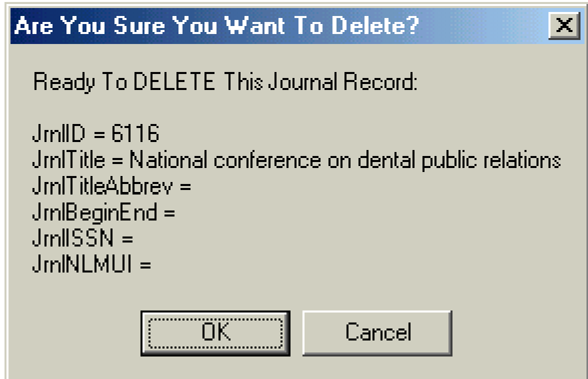
9. A message box will appear with the values to be changed, from and to:



10. Click Yes to change any instances of record 6116 to the default monograph record.



11. The Global changes have been completed. You can now choose to delete the old monograph title from the Journals Table (it doesn't affect the title name that's filed with the item records). Click the Delete Jrnl Button to delete



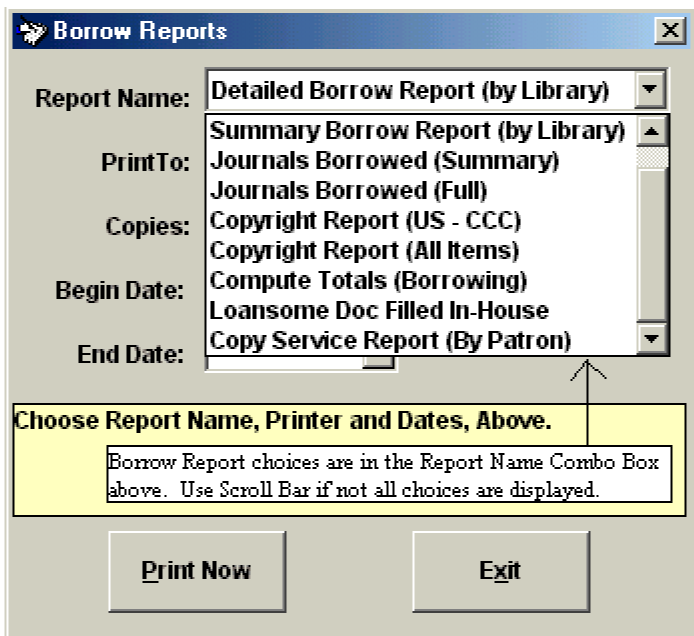
12. One more chance to back out, but click Ok to complete the transaction.

QuickDOC Reports

Reports are listed under the **Menu Bar item Reports**. Reports are available in separate forms for **Borrowed Items** and **Loaned Items**.

Borrow Reports

The **Borrow Reports form** gives choices for Report Name, Printer to print to (including Print Preview), Number of Copies to print, and Dates to include. Print Preview is always a good first choice, to get an idea of how many records will be sent to the printer.



Detailed Borrow Report

There are a number of basic Lend side reports included in QuickDOC. The first is the **Detailed Borrow Report**, which prints item-level information for each request filled during the period specified. Columns in the report include: **Lender**, **Request Number**, **Date Received**, **Title**, **Citation** and **Lender Charge**. These will not include Loansome Docs filled in-house. The first line of each Library's activity includes a **list of the Library Groups** to which that Library belongs. The format is as follows:

Library's Group memberships appear on the first line of each listing.

Detailed Borrow Report (by Library)
01-Jan-01 to 31-Dec-01

19-Apr-2002 **Beth Israel Deaconess Medical Center (01-Jan-01 to 31-Dec-01)** **Page 1**

Item	Lender	ReqNo	Date	Title	Citation	Charge
	ALUALA is a member of Library Group: OUT					
1	ALUALA	1733495	31-Jan-01	1999 Clinical transplantation	Oct;13(5):365-74	$0.00
2	ALUALA	1662560	31-Jan-01	1984 Peptides	Nov-Dec;5(6):1077-84	$0.00
3	ALUALA	1919657	31-Jan-01	1999 Int J STD AIDS	Mar;10(3):174-81	$0.00
4	ALUALA	1783206	31-Jan-01	1999 Canadian family physician Médecin d	Feb;45:373-9	$0.00
5	ALUALA	1919658	31-Jan-01	1998 Int J STD AIDS	Mar;9(3):139-45	$0.00
6	ALUALA	1684784	31-Jan-01	1995 NIDA research monograph	150:92-109	$0.00
7	ALUALA	1733520	31-Jan-01	1999 Clinical chemistry	Jul;45(7):934-41	$0.00
8	ALUALA	1957801	31-Jan-01	1999 Surgical radiologic anatomy	21(1):17-21	$0.00
9	ALUALA	1884927	31-Jan-01	1999 Am J Chinese medicine	27(3-4):299-305	$0.00
10	ALUALA	2004533	28-Feb-01	1973 Zhonghua yi xue za zhi	9():532-535	$0.00
11	ALUALA	1996861	28-Feb-01	1999 Eye (London, England)	Dec;13 (Pt 6):797-8	$0.00
12	ALUALA	2003927	28-Feb-01	1993 J paediatrics child health	Aug;29(4):295-7	$0.00
13	ALUALA	2130749	28-Feb-01	2000 Clinical J pain	Jun;16(2 Suppl):S67-72	$0.00
14	ALUALA	2252953	28-Feb-01	1997 Indian J pathology microbiology	Jan;40(1):71-4	$0.00
15	ALUALA	2211613	28-Feb-01	1999 Revue neurologique	155(9):731-6	$0.00
16	ALUALA	2058548	28-Feb-01	1999 Anaesthesia	May;54(5):461-5	$0.00

A subtotal appears at the end of each itemized Lending Library's listing, as in the following, from the University of Alabama at Birmingham:

92	ALUALA	3935698	31-Aug-01	1999 Documenta ophthalmologica. Advances	97(3-4):471-4	$0.00
93	ALUALA	3933131	31-Aug-01	1980 Zentralblatt für Neurochirurgie	41(1):49-56	$0.00
94	ALUALA	4094096	31-Aug-01	1993 South African J surgery. Suid-Afrik	Sep;31(3):104-6	$0.00
95	ALUALA	4274613	30-Sep-01	2001 Transfusion clinique et biologique	Jun;8(3):261-6	$0.00
96	ALUALA	4301354	30-Sep-01	2000 Anatomy embryology	Jan;201(1):63-74	$0.00
Total 96 Items From University Of Alabama At Birmingham					**Total Charged By ALUALA:**	**$0.00**

Each library is subtotaled, and there are Grand Totals listed at the very end of the report for **Total All Items**, **Total Libraries** and **Total Charges**.

Summary Borrow Report

The **Summary Borrow Report** lists total activity with each Library during the period in question: total items and the total amount charged.

Summary Borrow Report (by Library)
01-Jan-02 to 31-Dec-02

7-Jan-2003 **Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Dec-02)** **Page 1**

Library No.	Lender's LIBID		Items Borrowed	Charge	Lib #
1	AZUARI	University Of Arizona	1	$11.00	1
2	CAUCLA	University Of California, Los Angeles	1	$11.00	2
3	CAUCSF	University Of California San Francisco	1	$11.00	3
4	CAULVI	St Vincent Medical Center (OUT$)	1	$8.00	4
5	CTUCON	Uconn Health Ctr/L M Stowe Library (R8$)	9	$110.00	5
6	CTUHHH	Hartford Hospital (R8)	1	$0.00	6
7	CTUYAL	Yale University (R8$)	3	$33.00	7
8	FLUMIA	University Of Miami School Of Medicine	1	$11.00	8
9	GAUMUD	Mercer University Atlanta	1	$10.00	9
10	KYULOU	Kornhauser Health Sciences Library	1	$10.00	10
11	MAUBHA	Brockton Hospital (CELLS, MA)	3	$0.00	11

Library Groups appear in parentheses, if there are groups assigned to that library.

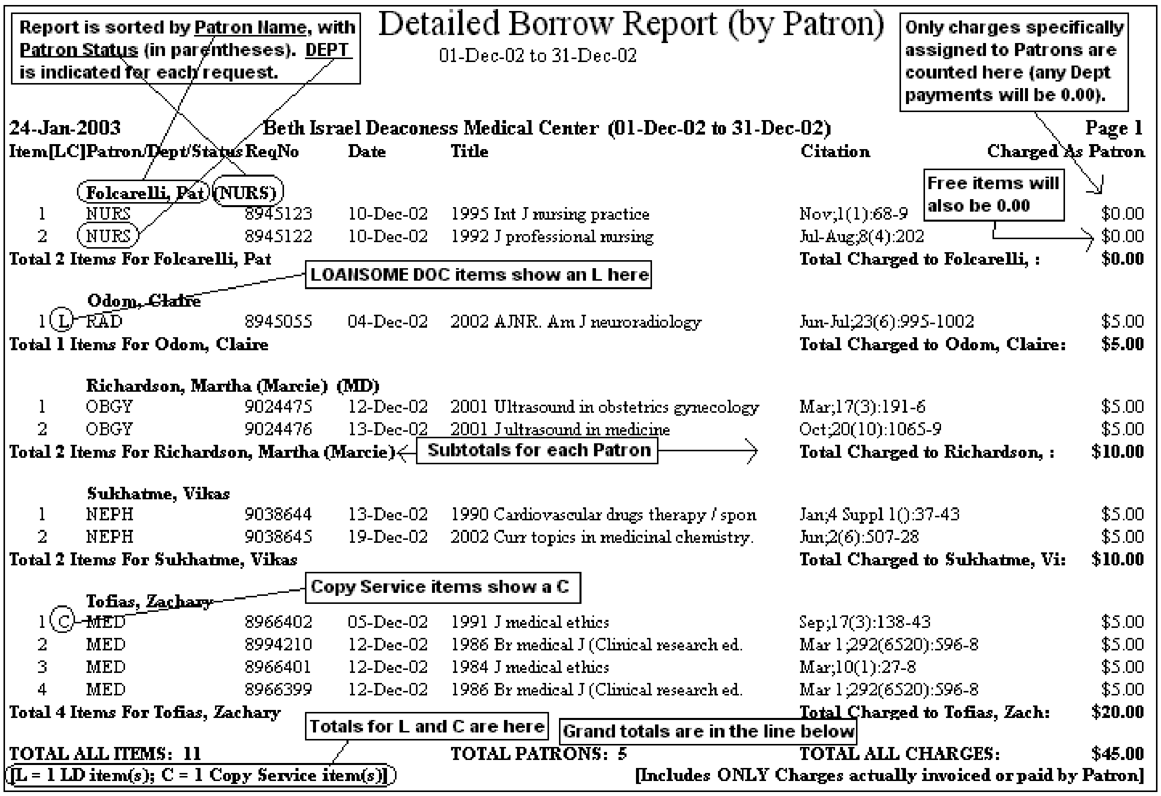
Detailed Borrow Report (by Patron)

The **Detailed Patron Report** includes a line for each Patron transaction during the period specified. It includes not just ILL activity, but also Copy Service and LOANSOME DOC requests that were filled in-house, so the totals here may be higher than reports for the same period that track only ILL activity. The report is sorted by Patron Name (Last, First), and by Rec'd Date within each Patron. It includes the Patron Status in parentheses after each Patron Name, and indicates the Dept referenced for each transaction.

Charges are those Local Charges that are billed to the Patron. If the item was billed to a Department or Cost Center, or if the Local Charge, itself, was 0.00, then the **Charged As Patron** here will be 0.00.

LOANSOME DOC and **Copy Service** items are indicated by an **L** or a **C**, respectively, just to the right of the item number.

The format of the **Detailed Patron Re**port is as follows:



Detailed Borrow Report (by Patron)

01-Dec-02 to 31-Dec-02

24-Jan-2003 Beth Israel Deaconess Medical Center (01-Dec-02 to 31-Dec-02) Page 1

Item[LC]Patron/Dept/Status	ReqNo	Date	Title	Citation	Charged As Patron
Folcarelli, Pat (NURS)					
1 NURS	8945123	10-Dec-02	1995 Int J nursing practice	Nov;1(1):68-9	$0.00
2 NURS	8945122	10-Dec-02	1992 J professional nursing	Jul-Aug;8(4):202	$0.00
Total 2 Items For Folcarelli, Pat				Total Charged to Folcarelli, :	$0.00
Odom, Claire					
1 L RAD	8945055	04-Dec-02	2002 AJNR. Am J neuroradiology	Jun-Jul;23(6):995-1002	$5.00
Total 1 Items For Odom, Claire				Total Charged to Odom, Claire:	$5.00
Richardson, Martha (Marcie) (MD)					
1 OBGY	9024475	12-Dec-02	2001 Ultrasound in obstetrics gynecology	Mar;17(3):191-6	$5.00
2 OBGY	9024476	13-Dec-02	2001 J ultrasound in medicine	Oct;20(10):1065-9	$5.00
Total 2 Items For Richardson, Martha (Marcie)				Total Charged to Richardson, :	$10.00
Sukhatme, Vikas					
1 NEPH	9038644	13-Dec-02	1990 Cardiovascular drugs therapy / spon	Jan;4 Suppl 1():37-43	$5.00
2 NEPH	9038645	19-Dec-02	2002 Curr topics in medicinal chemistry.	Jun;2(6):507-28	$5.00
Total 2 Items For Sukhatme, Vikas				Total Charged to Sukhatme, Vi:	$10.00
Tofias, Zachary					
1 C MED	8966402	05-Dec-02	1991 J medical ethics	Sep;17(3):138-43	$5.00
2 MED	8994210	12-Dec-02	1986 Br medical J (Clinical research ed.	Mar 1;292(6520):596-8	$5.00
3 MED	8966401	12-Dec-02	1984 J medical ethics	Mar;10(1):27-8	$5.00
4 MED	8966399	12-Dec-02	1986 Br medical J (Clinical research ed.	Mar 1;292(6520):596-8	$5.00
Total 4 Items For Tofias, Zachary				Total Charged to Tofias, Zach:	$20.00
TOTAL ALL ITEMS: 11			TOTAL PATRONS: 5	TOTAL ALL CHARGES:	$45.00

[L = 1 LD item(s); C = 1 Copy Service item(s)] [Includes ONLY Charges actually invoiced or paid by Patron]

Summary Borrow Report (by Patron)

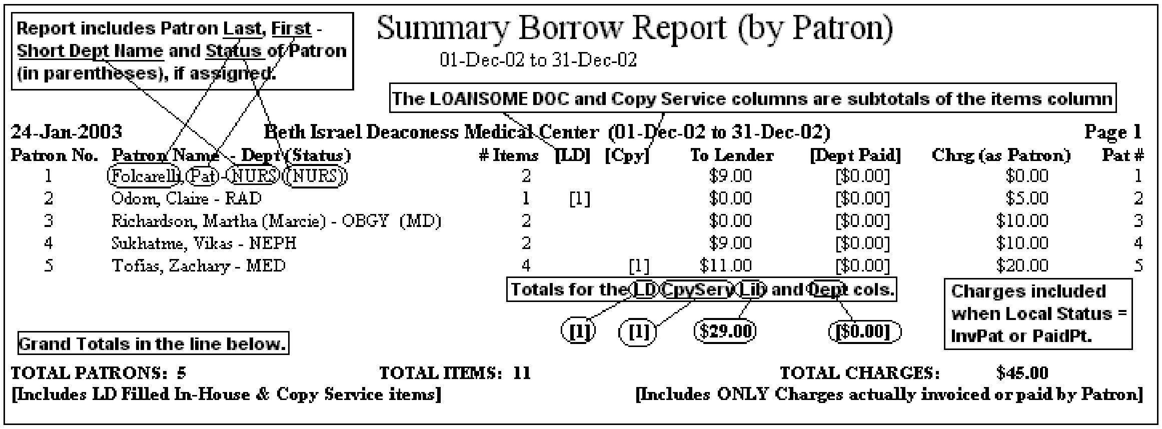
The **Summary Patron Report** includes a line for each Patron, along with the Dept and, in parentheses, the **Patron Status**. All transactions during the period specified are sorted by Patron Name, totals for each Patron are cumulated under **Items**; **Lending Library Charges** for each Patron are shown in the column **Chrg By Lender**; **Local Charges Paid By Dept or Cost Center** are shown in [**Dept Paid**], and actual **Local Charges Paid by Patron** are in the **Charged (as Patron)** column.

The report includes not just ILL activity, but also **Copy Service** and **LOANSOME DOC** requests that were filled in-house, so the totals here may be higher than reports for the same period that track only ILL activity. The **[LD]** and **[Cpy]** columns are subtotals of the Items column on that same line and are included in that item total. The [LD] column includes both in-house LOANSOME DOCs and those filled after referral on DOCLINE.

The Local Charges that were assigned to Departments or Cost Centers aren't included in the Charged (as Patron) Totals, but are shown [in brackets] here. The report is sorted by Patron Name (Last, First), and by Rec'd Date within each Patron. It includes the **Patron Status** in parentheses after each Patron Name, and indicates the **Dept** referenced for each transaction.

Charges are those Local Charges that are **billed to the Patron**. If the item was billed to a Department or Cost Center, or if the Local Charge, itself, was 0.00, then the **Charged As Patron** here will be 0.00.

The format of the **Summary Patron Re**port is as follows:


Report includes Patron Last, First - Short Dept Name and Status of Patron (in parentheses), if assigned.

Summary Borrow Report (by Patron)
01-Dec-02 to 31-Dec-02

The LOANSOME DOC and Copy Service columns are subtotals of the items column

24-Jan-2003 Beth Israel Deaconess Medical Center (01-Dec-02 to 31-Dec-02) Page 1

Patron No.	Patron Name - Dept (Status)	# Items	[LD]	[Cpy]	To Lender	[Dept Paid]	Chrg (as Patron)	Pat #
1	Folcarelli, Pat - NURS (NURS)	2			$9.00	[$0.00]	$0.00	1
2	Odom, Claire - RAD	1	[1]		$0.00	[$0.00]	$5.00	2
3	Richardson, Martha (Marcie) - OBGY (MD)	2			$0.00	[$0.00]	$10.00	3
4	Sukhatme, Vikas - NEPH	2			$9.00	[$0.00]	$10.00	4
5	Tofias, Zachary - MED	4		[1]	$11.00	[$0.00]	$20.00	5

Totals for the LD CpySer Lib and Dept cols.

Charges included when Local Status = InvPat or PaidPt.

Grand Totals in the line below.

[1] [1] $29.00 [$0.00]

TOTAL PATRONS: 5 TOTAL ITEMS: 11 TOTAL CHARGES: $45.00

[Includes LD Filled In-House & Copy Service items] [Includes ONLY Charges actually invoiced or paid by Patron]

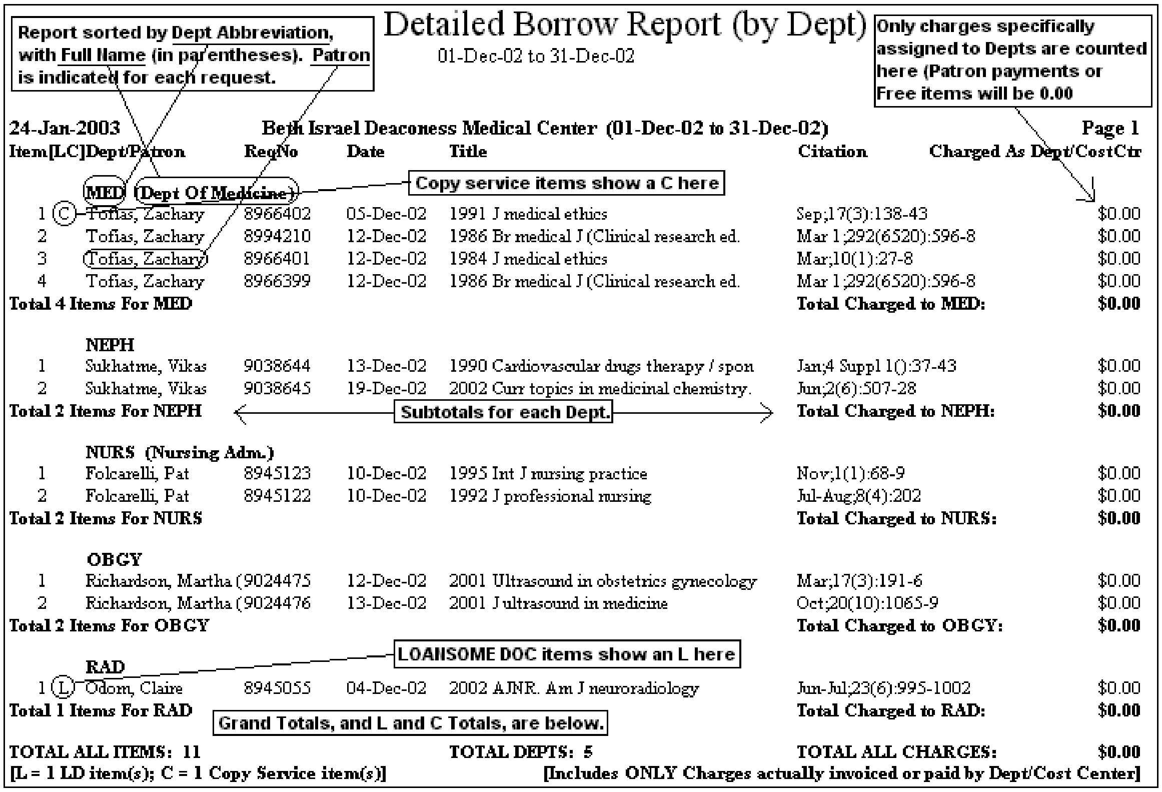
Detailed Borrow Report (by Dept)

The **Detailed Dept Report** includes a line for each Dept transaction during the period specified. It includes not just ILL activity, but also Copy Service and LOANSOME DOC requests that were filled in-house, so the totals here may be higher than reports for the same period that track only ILL activity. The report is sorted by Dept Abbreviation and by Rec'd Date within each Dept. It includes the Full Department Name (in parentheses) after each Dept Abbreviaton, and indicates the Patron referenced for each transaction.

Charges are those Local Charges that are billed to this Department (or to a Cost Center of this Department). If the item was billed to a Patron, or if the Local Charge, itself, was 0.00, then the **Charged As Dept/ CostCtr** here will be 0.00.

LOANSOME DOC and **Copy Service** items are indicated by an **L** or a **C**, respectively, just to the right of the item number.

The format of the **Detailed Department Report** is as follows:



Report sorted by Dept Abbreviation, with Full Name (in parentheses). Patron is indicated for each request.

Detailed Borrow Report (by Dept)
01-Dec-02 to 31-Dec-02

Only charges specifically assigned to Depts are counted here (Patron payments or Free items will be 0.00

24-Jan-2003 Beth Israel Deaconess Medical Center (01-Dec-02 to 31-Dec-02) Page 1

Item[LC]Dept/Patron	ReqNo	Date	Title	Citation	Charged As Dept/CostCtr
MED (Dept Of Medicine)			Copy service items show a C here		
1 C Tofias, Zachary	8966402	05-Dec-02	1991 J medical ethics	Sep;17(3):138-43	$0.00
2 Tofias, Zachary	8994210	12-Dec-02	1986 Br medical J (Clinical research ed.	Mar 1;292(6520):596-8	$0.00
3 Tofias, Zachary	8966401	12-Dec-02	1984 J medical ethics	Mar;10(1):27-8	$0.00
4 Tofias, Zachary	8966399	12-Dec-02	1986 Br medical J (Clinical research ed.	Mar 1;292(6520):596-8	$0.00
Total 4 Items For MED				Total Charged to MED:	$0.00
NEPH					
1 Sukhatme, Vikas	9038644	13-Dec-02	1990 Cardiovascular drugs therapy / spon	Jan;4 Suppl 1():37-43	$0.00
2 Sukhatme, Vikas	9038645	19-Dec-02	2002 Curr topics in medicinal chemistry.	Jun;2(6):507-28	$0.00
Total 2 Items For NEPH		Subtotals for each Dept.		Total Charged to NEPH:	$0.00
NURS (Nursing Adm.)					
1 Folcarelli, Pat	8945123	10-Dec-02	1995 Int J nursing practice	Nov;1(1):68-9	$0.00
2 Folcarelli, Pat	8945122	10-Dec-02	1992 J professional nursing	Jul-Aug;8(4):202	$0.00
Total 2 Items For NURS				Total Charged to NURS:	$0.00
OBGY					
1 Richardson, Martha (	9024475	12-Dec-02	2001 Ultrasound in obstetrics gynecology	Mar;17(3):191-6	$0.00
2 Richardson, Martha (	9024476	13-Dec-02	2001 J ultrasound in medicine	Oct;20(10):1065-9	$0.00
Total 2 Items For OBGY				Total Charged to OBGY:	$0.00
RAD			LOANSOME DOC items show an L here		
1 L Odom, Claire	8945055	04-Dec-02	2002 AJNR. Am J neuroradiology	Jun-Jul;23(6):995-1002	$0.00
Total 1 Items For RAD		Grand Totals, and L and C Totals, are below.		Total Charged to RAD:	$0.00
TOTAL ALL ITEMS: 11			TOTAL DEPTS: 5	TOTAL ALL CHARGES:	$0.00

[L = 1 LD item(s); C = 1 Copy Service item(s)] [Includes ONLY Charges actually invoiced or paid by Dept/Cost Center]

Summary Borrow Report (by Dept)

The **Summary Dept Report** includes a line for each Dept and, in parentheses, the **Full Dept Name**, if any is registered for that Dept. All transactions during the period specified are sorted by Dept, totals for each Dept are cumulated under **Items**; **Lending Library Charges** for each Dept are shown in the column **Chrg By Lender**; **Local Charges Paid By Patron** are shown in [**Patron Paid**], and actual **Local Charges Paid by Department** are in the **Charged (as Dept)** column.

The report includes not just ILL activity, but also **Copy Service** and **LOANSOME DOC** requests that were filled in-house, so the totals here may be higher than reports for the same period that track only ILL activity. The **[LD]** and **[Cpy]** columns are subtotals of the Items column on that same line and are included in that item total. The [LD] column includes both in-house LOANSOME DOCs and those filled after referral on DOCLINE.

The Local Charges that were assigned to Patrons aren't included in the Charged (as Dept) Totals, but are shown [in brackets] under [**Patron Paid**] here. The report is sorted by Dept Abbreviation. It includes the **Full Dept Name** in parentheses after each Dept Name, and indicates the **Dept** referenced for each transaction.

Charges are those Local Dept/Cost Ctr charges that are billed to this Department (or to a Cost Center of this Department). If the item was billed to a Patron, or if the Local Charge, itself, was 0.00, then the **Charged As Dept/CostCtr** here will be 0.00.

The format of the **Summary Department Report** is as follows:

Report includes Dept Abbreviation and Full Dept Name (in parentheses), if assigned.

Summary Borrow Report (by Dept)

01-Dec-02 to 31-Dec-02

The LOANSOME DOC and Copy Service columns are subtotals of the items column

24-Jan-2003 Beth Israel Deaconess Medical Center (01-Dec-02 to 31-Dec-02) Page 1

Dept No.	Dept Abbr. (Dept Full Name)	# Items	[LD]	[Cpy]	To Lender	[Patron Paid]	Chrg (as Dept)	Dep #
1	MED (Dept Of Medicine)	4		[1]	$11.00	[$20.00]	$0.00	1
2	NEPH	2			$9.00	[$10.00]	$0.00	2
3	NURS (Nursing Adm.)	2			$9.00	[$0.00]	$0.00	3
4	OBGY	2			$0.00	[$10.00]	$0.00	4
5	RAD	1	[1]		$0.00	[$5.00]	$0.00	5
			[1]	[1]	$29.00	[$45.00]		

Totals for the LD CpyServ Lib and Dept cols

Charges included when Local Status = InvDep or PaidDp.

Grand Totals in the line below

TOTAL DEPTS: 5 TOTAL ITEMS: 11 TOTAL CHARGES: $0.00

[Includes LD Filled In-House & Copy Service items] [Includes ONLY Charges actually invoiced or paid by Dept/Cost Center]

Journals Borrowed (Summary) Report

The **Journals Borrowed (Summary) Report** lists each Journal Title borrowed during the period in question, along with the number of times it was loaned and the ISSN.

Journals Borrowed (Summary)

01-Jan-01 to 31-Oct-01

19-Apr-2002 Beth Israel Deaconess Medical Center (01-Jan-01 to 31-Oct-01) Page 1

Journal#	# Borrowed	Jrnl Title	ISSN
1	1	[Chung-hua i hsüeh tsa chih] Chinese medical J; Fr	0578-1337
2	1	[Zasshi] J. Nihon Naika Gakkai	0021-5384
3	1	AANA J	0094-6354
4	2	ACOG educational bulletin.	
5	2	ACOG newsletter.	0400-048X
6	2	ACOG practice bulletin	1099-3630
7	1	Acta chirurgiae plasticae	0001-5423
8	2	Acta chirurgica Belgica	0001-5458
9	1	Acta chirurgica scand supplementum	0301-1860
10	1	Acta crystallographica. Section D, Biological crys	0907-4449
11	1	Acta cytologica	0001-5547
12	1	Acta horticulturae.	0567-7572
13	1	Acta Med Port	0870-399X
14	1	Acta medica (hradec kralove)	1211-4286
15	1	Acta medica Okayama	0386-300X

The left hand column is counting the titles as they are printed. At the end of the report is a general total:

997	1	World J surgery	0364-2313
998	2	Wound repair regeneration	1067-1927
999	2	Yeast (Chichester, West Sussex)	0749-503X
1000	1	Zeitschrift für arztliche fortbildung	0044-2178
1001	1	Zeitschrift für Kinderchirurgie	0174-3082
1002	2	Zeitschrift für Naturforschung. C, J biosciences	0341-0382
1003	1	Zeitschrift für Orthopädie und ihre Grenzgebiete	0044-3220
1004	1	Zentralblatt für Gynäkologie	0044-4197
1005	2	Zentralblatt für Neurochirurgie	0044-4251
1006	1	Zhonghua yi xue za zhi	

TOTAL JRNLS: 1,006 TOTAL ITEMS: 1,820

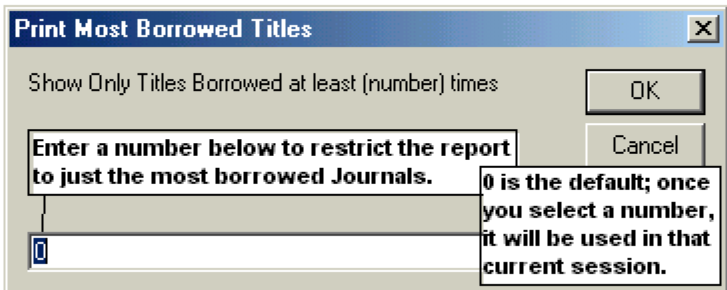
Journals Borrowed (Full) Report

The **Journals Borrowed (Full) Report** lists each Journal Title borrowed during the period in question, but also includes a line for each item, including the Lender, Year of publication and the Patron Name. It generates a list of ALL journals borrowed, not just those subject to Copyright,

sorted by # Borrows, most to least. Within each Journal Title, items are **sorted by Patron Name**, so that items borrowed for a single patron will be grouped together. This report can also be configured to print only those titles with a certain number of times borrowed, so that only those titles you borrowed most often will be included.

Print Most Borrowed Journal Titles

An input box will pop up after you've selected the Journals Borrowed (Full) Report to ask at which number of Borrows you want to cut off the printout:



If you leave it at 0 (or enter 1) it will print all items. To see all journals borrowed five or more times during the year enter 5. The report will be printed with the most-borrowed titles first, down to the last title borrowed 5 or more times.

Journals Borrowed (Full)

(Includes All Journals Borrowed at least 5 times, sorted by # of Borrows, then by Patron, with Lender Inf

01-Jan-02 to 31-Oct-02

23-Nov-2002 **Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Oct-02)** **Page 1**

Journal#	# Borrowed	Lender	Year	Jrnl Title	Patron
1	1	OHUCHE	1996	Leukemia lymphoma	Bassal, Mylene Angel
	2	OHUCHE	1997		Bassal, Mylene Angel
	3	OHUCHE	2001		Daly, Jay
	4	OHUCHE	1998		Liang, Xayuan
	5	NSCQHE	1991		Liang, Xayuan
	6	OHUCHE	1999		Trobaugh, Angela
	7	OHUCHE	1999		Trobaugh, Angela
	8	OHUCHE	1999		Trobaugh, Angela
2	1	COUZAM	1991	Am J surgical pathology	Janik, Jr., Joe
	2	COUDGC	1999		Liang, Xayuan
	3	COUDGC	2001		Mierau, Gary
	4	COUDGC	2001		Mierau, Gary
	5	COUUFC	2001		Mierau, Gary
	6	COUDGC	1999		O'Connor, Judith
	7	COUDGC	1985		O'Connor, Judith
3	1	COULTR	2001	Am J hospice palliative care	English, Nancy
	2	COULTR	2001		Pearson, Joanne
	3	COULTR	1999		Pearson, Joanne
	4	COUVHD	1993		Pearson, Joanne
	5	COULTR	2000		Pearson, Joanne
	6	COULTR	2000		Pearson, Joanne

This report can be fairly lengthy, if you don't restrict it to most borrowed titles, with a line for each item loaned. The individual numbers in the second column (**# Borrowed**) provide the subtotal for each Journal during the printout. This report also includes a total at the end of the report:

23-Nov-2002		Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Oct-02)				Page 2
Journal#	**# Borrowed**	**Lender**	**Year**	**Jrnl Title**	**Patron**	
9	2	COUDGC	2000	Seminars in neurology	Riffe, Stacey	
	3	COUDGC	2001		Sokol, Ron	
	4	COUDMS	2000		Strunc, Michael	
	5	COUDGC	2001		White, Andrew	
TOTAL ALL ITEMS: 53				**TOTAL JRNLS: 9**		

Copyright Report (US - CCC)

The **Copyright Report (US - CCC)** generates a list of ONLY those items that currently fall outside of the U.S. CONTU Guidelines for copyright compliance.

In general, the **CONTU Guidelines** require reporting if:

1. This Journal Article Borrowed is less than 5 years old;
2. There have been 5 or more previous Borrows of this type from this journal this year;
3. This is a Title for which you do not have a current subscription; *and I would also add:*
4. *You have not already paid a royalty through a third-party at the time of ordering*.

The Copyright Report (US – CCC) therefore prints only Journal items for which a Copyright Charge might be due, usually payable through the **Copyright Clearance Center** (the CCC of the report title).

This report therefore excludes borrowed articles from Journal Titles that provided fewer than 6 articles in the calendar year specified; it also excludes items published earlier than 5 years before the calendar year in question; and it also excludes requests marked **CCL** (the U.S. standard that tells the Lender that this request conforms to the Copyright Law, generally because the item is greater than 5 years old, rather than the CONTU Guidelines, **CCG**, which generally means the item borrowed is within the 5 year period), because this is a way to gather any number of exceptions (including “We own it!” and “We already paid the royalty!”) in a single value.

It also checks the Publication Date, and excludes anything older than 5 years before the Begin Date of the report, whether or not that item is marked CCL or CCG.

The report also excludes **Loansome Doc requests filled in-house** (i.e., Loansome Doc requests where the Lending Library is the same as the Borrowing Library), since this activity is more like a **Copy Service** than **Interlibrary Loan**. Of course there are **Fair Use** issues here, etc., but that is outside the scope of this discussion.

The **current subscription** distinction, as mentioned above in the third bullet of the CONTU Guidelines discussion, is a bit more complicated. At some point, we’ll be able to check Journal Titles for current subscriptions directly in QuickDOC.MDB; the fields are there but the enabling code is not. So, for the time being, use the **DOCLINE CC Field** or the **CC Field in the Add Borrow form** for non-DOCLINE requests, to register your own compliance with the Guidelines, by choosing CCL instead of CCG when the Journal in question, even if within the 5 year period, is one for which you have a subscription. The QuickDOC Copyright Report (US – CCC) will then skip that item as it makes its calculations.

Fnally, in the case of items borrowed from Lenders who include the **Royalty Charge** as a part of the Loan Charge (such as **CISTI**, or any of the **commercial document delivery providers**), mark these records **CCL** so that they will not be included in the Copyright Report (US – CCC).

If you enter an **incorrect CC value** at the time that any item is ordered, you can change it in the **BorrBibCopyright** field that is available on any Borrow Grid by clicking the + sign at the left of the appropriate row.

The Copyright Report (US – CCC) includes # of **pages**, Year, Jrnl Title (ISSN), and the citation. As the subtitle suggests, **only** those items not excluded by time or CCL or the **Rule of 5** will appear in the report. This is a conservative estimate, so that if your Start Date is anywhere in 2001 (as it is below), QuickDOC will assign the **CCL cutoff date** to the earliest it could have been (in the case below, a report date of 1/1/2001 yields a cutoff date of December 31, 1995 --- **Anything before that COULD NOT BE within the 5-year period**) and will include any items after that that meet the other criteria. So the Publication Years within that constraint are 2000, 1999, 1998, 1997, 1996 (with 2001 included by definition, as it progresses).

Of course, this floating 5-Year period will change during the year in question, so that something borrowed in January, 2001 will be properly included, while something else, borrowed at the end of the year, might be included in the total while it should have been excluded, instead. In these cases, use the CCL Copyright value to exclude items that would otherwise be included in the general Copyright Report (US – CCC). You can use the Copyright Report (All Items), which is the next report described below, to perform a final check for intra-year items that may be excluded under CONTU because the publication date/month within year 5 (1996 in the case above) is earlier than the date/month when the item was borrowed during this year.

This report prints **ONLY those items that should be reported to the Copyright Clearance Center** (**CCC**) in one of their reports,

Copyright Report (US - CCC)

(US CONTU Guidelines: Jrnl Borrows > 5/year/title for articles published after 1995 and CCG)

01-Jan-01 to 31-Oct-01

19-Apr-2002 **Beth Israel Deaconess Medical Center (01-Jan-01 to 31-Oct-01)** **Page 1**

Journal#	# > 5	#Pgs	Year	Jrnl Title (ISSN)	Citation
1	1	6	1999	Acta orthopaedica Belgica (0001-6462)	Dec;65(4):418-23
	2	5	1999		65 Suppl 1:57-61
2	1	4	2001	Allergy asthma proceedings (1088-5412)	Mar-Apr;22(2):71-4
	2	3	2000		Nov-Dec;21(6):377-9
3	1	6	1996	Ann epidemiology (1047-2797)	Mar;6(2):154-9
	2	12	1998		May;8(4):250-61
4	1	4	2000	Arch disease in childhood. Fetal neonata (1359-2998)	Sep;83(2):F97-100
	2	5	2000		Sep;83(2):F86-90
	3	2	2000		May;82(3):F248-9

At the end of the Copyright Report (US – CCC) will be the Grand totals:

13	1	7	2001	Obesity research (1071-7323)	Jul;9(7):394-400
	2	8	1999		Jan;7(1):1-8
	3	8	1999		May;7(3):265-72
14	1	14	2000	Progress in pediatric cardiology (1058-9813)	May 1;11(1):25-38
	2	9	2000		May 1;11(1):55-63
	3	15	2000		Jun 1;11(2):115-129
15	1	3	1998	Ultrasound in obstetrics gynecology (0960-7692)	Jun;11(6):456-8

TOTAL ALL ITEMS: 29 **TOTAL JRNLS: 15** **TOTAL PAGES: 232**

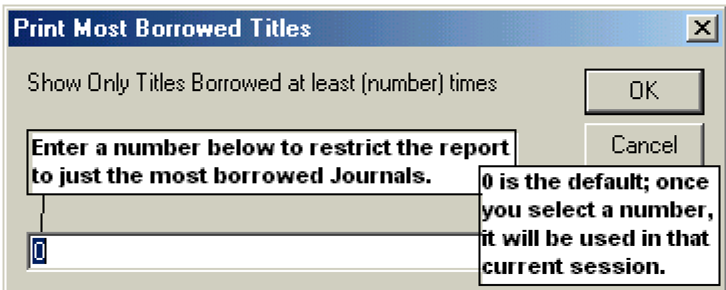
This summary is the total of the U.S. CCC Report. Before generating a final report for CCC, first print the Copyright Report (All Items) for all Journals borrowed 6 times or more. Use this printout to check for Journals Owned, or Items already paid for, or Borrows that pre-date the five year CONTU Guidelines checkoff within the year. Change these to CCL if you don't want them included in the Copyright Report (US – CCC). Change any other values that may be exposed as incorrect wihtin this report. Then print the final CCC Report.

Copyright Report (All Items)

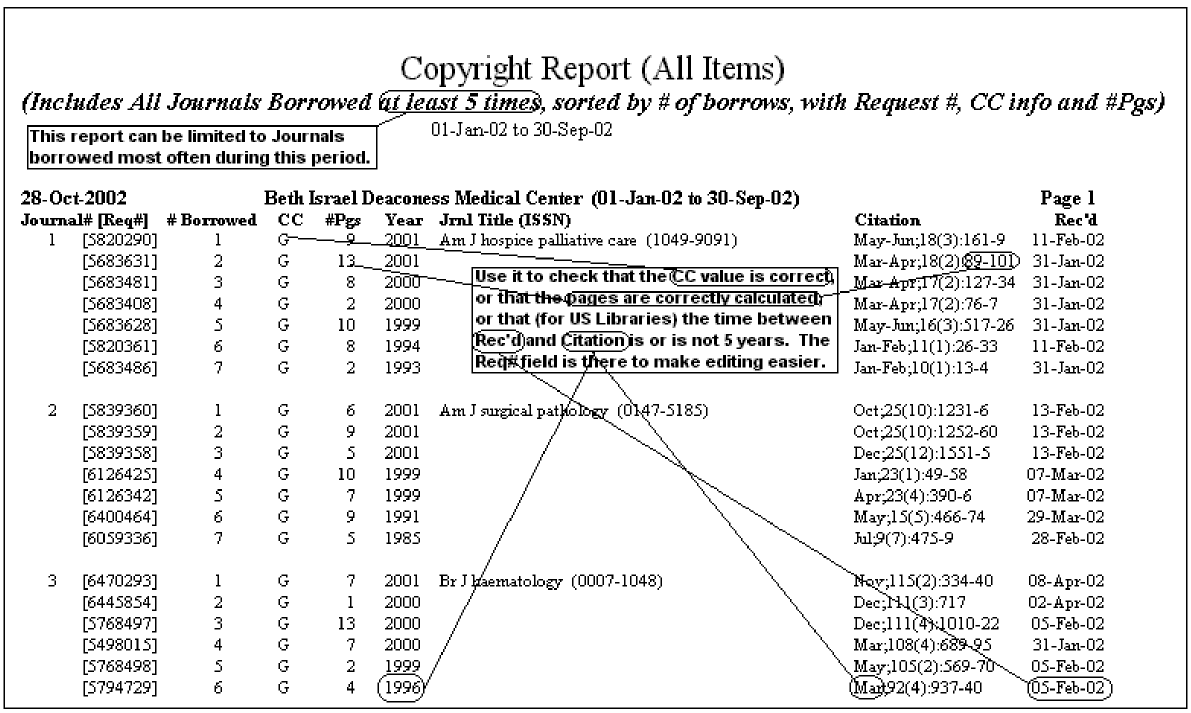
The **Copyright Report (All Items)** generates a list of ALL journals borrowed, not just those subject to Copyright, **sorted by # Borrows**, most to least. It can also be told to print only those titles with a certain number of times borrowed, so that only those titles you borrowed most often will be included. Because the purpose of this report is to provide a mechanism for **fine-tuning Copyright data** before preparing the official CCC Copyright Report, it also includes the Request Number and Date Received, to facilitate editing in the actual request, if necessary. No Patron Information appears on this report, but it does appear on the Journals Borrowed (Full).

Print Most Borrowed Titles

An input box will pop up after you've selected the Copyright Report (All Items) to ask at which number of Borrows you want to cut off the printout:



If you leave it at 0 (or enter 1) it will print all items. To see all journals borrowed five or more times during the year enter 5. The report will be printed with the most-borrowed titles first, down to the last title borrowed 5 or more times.



Copyright Report (All Items)

(Includes All Journals Borrowed at least 5 times, sorted by # of borrows, with Request #, CC info and #Pgs)

01-Jan-02 to 30-Sep-02

This report can be limited to Journals borrowed most often during this period.

28-Oct-2002 **Beth Israel Deaconess Medical Center (01-Jan-02 to 30-Sep-02)** **Page 1**

Use it to check that the CC value is correct, or that the pages are correctly calculated, or that (for US Libraries) the time between Rec'd and Citation is or is not 5 years. The Req# field is there to make editing easier.

Journal#	[Req#]	# Borrowed	CC	#Pgs	Year	Jrnl Title (ISSN)	Citation	Rec'd
1	[5820290]	1	G	9	2001	Am J hospice palliative care (1049-9091)	May-Jun;18(3):161-9	11-Feb-02
	[5683631]	2	G	13	2001		Mar-Apr;18(2):89-101	31-Jan-02
	[5683481]	3	G	8	2000		Mar-Apr;17(2):127-34	31-Jan-02
	[5683408]	4	G	2	2000		Mar-Apr;17(2):76-7	31-Jan-02
	[5683628]	5	G	10	1999		May-Jun;16(3):517-26	31-Jan-02
	[5820361]	6	G	8	1994		Jan-Feb;11(1):26-33	11-Feb-02
	[5683486]	7	G	2	1993		Jan-Feb;10(1):13-4	31-Jan-02
2	[5839360]	1	G	6	2001	Am J surgical pathology (0147-5185)	Oct;25(10):1231-6	13-Feb-02
	[5839359]	2	G	9	2001		Oct;25(10):1252-60	13-Feb-02
	[5839358]	3	G	5	2001		Dec;25(12):1551-5	13-Feb-02
	[6126425]	4	G	10	1999		Jan;23(1):49-58	07-Mar-02
	[6126342]	5	G	7	1999		Apr;23(4):390-6	07-Mar-02
	[6400464]	6	G	9	1991		May;15(5):466-74	29-Mar-02
	[6059336]	7	G	5	1985		Jul;9(7):475-9	28-Feb-02
3	[6470293]	1	G	7	2001	Br J haematology (0007-1048)	Nov;115(2):334-40	08-Apr-02
	[6445854]	2	G	1	2000		Dec;111(3):717	02-Apr-02
	[5768497]	3	G	13	2000		Dec;111(4):1010-22	05-Feb-02
	[5498015]	4	G	7	2000		Mar;108(4):689-95	31-Jan-02
	[5768498]	5	G	2	1999		May;105(2):569-70	05-Feb-02
	[5794729]	6	G	4	1996		Mar;92(4):937-40	05-Feb-02

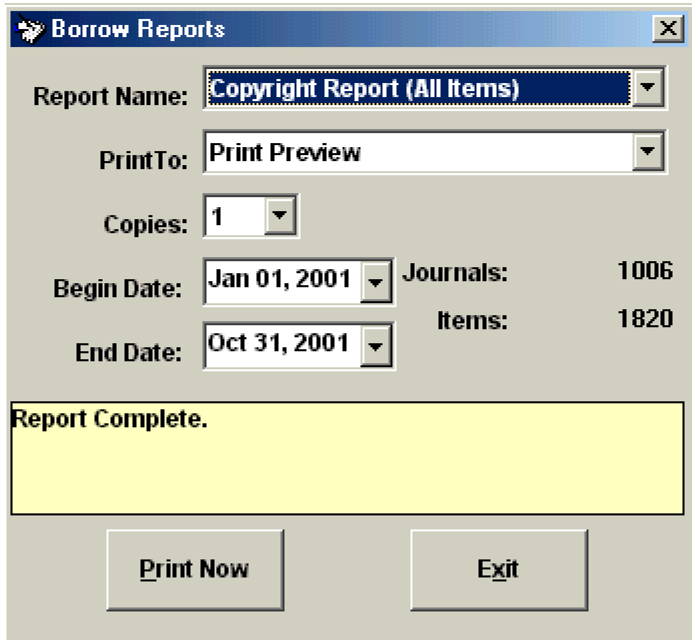
This report will also total items, journals and pages at the end:

30-Oct-2002 Beth Israel Deaconess Medical Center (01-Jan-02 to 30-Sep-02) Page 2

Journal# [Req#]	# Borrowed	CC	#Pgs	Year	Jrnl Title (ISSN)	Citation	Rec'd
9 [5412620]	4	G	8	2000	Seminars in neurology (0271-8235)	20(2):225-32	25-Jan-02
[5427061]	5		12	1998		18(2):185-196	25-Jan-02

TOTAL ALL ITEMS: 51 TOTAL JRNLS: 9 TOTAL PAGES: 336

as well as on the Form, itself (most QuickDOC Reports will do this as well).



Compute Totals (Borrowing) Report

The **Compute Totals (Borrowing) Report** provides a quick snapshot of Borrowing activity in various categories, such as **Item Source**, **Delivery Method**, **Type of Item**, etc. It also calculates percentages of activity during the period sepcified, and computes an **Average Charge per Item** for that period, along with Turnaround Time for items sent via various systems, etc.

This report also lists activity in a **Copy Service**, if you have one, and Copy Service items (along with Loansome Docs filled within your Library---which aren't counted as Borrows in some cases, such as Copyright Reports and the report here of Referral Reasons) are broken out separately and won't be included in the totals.

The Compute Totals Report also gives Totals and Averages for Delivery Methods, Source of Request, Copy Service and various **Loansome Doc Activity Reports**. It gives the percentage of items on each Source that were delivered electronically. Totals for **Referral Reasons** are listed at the end of this one-page report. The report also gives a subtotal within each Source if any of those items were monographs or audio-visuals.

The top Compute Totals screen appears as follows:

Compute Totals (Borrowing)

01-Jan-02 to 15-Apr-02

This column tracks the % from each Source that was delivered electronically.

15-Jun-2002 — Beth Israel Deaconess Medical Center (01-Jan-02 to 15-Apr-02) — Page 1

Item Source	TOTAL ITEMS	Source % Total	Physical Delivery: Mail	PickUp	Other	(Mono/ AV)	Web	Electronic Delivery: Ariel	Email	Fax	% Elect	Item Sent To: Library	Patron	Turnaround Avg # Days
DOCLINE	587	89.62%	547						13	27	7%	587		5.5
LOANSOME DOC	4	0.61%	2					1		1	50%	4		.
DOCLINE & LD	591	90.23%	549					1	13	28	7%	591		5.5
OCLC	56	8.55%	56									56		4.7
RLIN														
Mail														
Telephone														
Fax														
Other	4	0.61%	1							3	75%	4		2.8
Copy Service	4	0.61%	4										4	.

Monograph and AV subtotals for each line appear here

[Totals below do not include Copy Service items, but will include LD Items filled by MAUBET.]

	TOTAL ITEMS		Mail					Ariel	Email	Fax		Library		Avg # Days
TOTAL REC'D:	**651**		**606**					**1**	**13**	**31**		**651**		**5.4**
% of Totals:			**93.09%**					**0.15%**	**2.00%**	**4.76%**				

LOANSOME DOC Activity:					
	Total LD Items:	**4**	**% of All LD:**	**100.00%**	
	Total LD Rec'd:	**4**		**100.00%**	**4**
	Filled by MAUBET:	**2**		**50.00%**	**2**
	Filled on DOCLINE:	**2**		**50.00%**	**2**
	Not Filled:			**0.00%**	

The first page of Compute Totals (Borrowing) also now shows a report of the methods of **Payments to Lenders** for the period, along with **total charges** allocated to each **payment type**, with categories for **EFTS**, **IFM**. **Invoice/Other, Not Yet Paid** and **Free**. The report also gives a subtotal within each Source if any of those items were **Monographs, Journals, E-Journals** or **audio-visuals**.

	Physical	Electronic	
TOTAL Physical & Electronic FILLS:	**109**	**56**	**165**
% of Totals:	**66.06%**	**33.94%**	

E-Journals included by type

By Type:	**Jrnls: 161**	**E-Jrnls: 1**	**Monographs: 3**	**AV:**	**Originals:**	**Copies: 165**	**Rush:**
% of Totals:	**97.58%**	**0.61%**	**1.82%**			**100.00%**	

TOTAL ITEMS:	**Rec'd**	**Unsuccessful**	**Outstanding**	**Grand Total**
	165	**21**	**9**	**195**
% of Totals:	**84.62%**	**10.77%**	**4.62%**	

PAYMENTS: Items Paid Via:	**EFTS**	**IFM**	**Invoice/Other**	**Not Yet Paid**	**Free**
	43		**17**	**32**	**73**
Est $ By Method:	**$480.00**		**$158.00**	**$327.00**	**$0.00**
% of Rec'd Items:	**26.06%**		**10.30%**	**19.39%**	**44.24%**
TOTAL Cost: **$965.00**			**Avg Cost/Item: $5.85**		

In addition, the Borrow report also lists **Referral Reasons** for requests, when they were entered, along with the percentage of all requests the listed Reason represented. Totals for Referral Reasons won't include any Copy Service items or Loansome Doc items that were filled from your collection.

Report on Referral Reasons as indicated when the request was sent:

[Totals below do not include Copy Service OR Loansome Doc items filled by MAUBET.]

REFERRAL REASONS:	Code	Description	# of Items	% of Total Req.
	BDY	At Bindery	7	1.00%
	LAC	Lacking (Issue/Vol)	99	14.14%
	NOT	Not owned (Title)	562	80.29%
	NYR	Not yet received	1	0.14%
	OTH	Other	2	0.29%
		No Ref Reason	29	4.14%
		Total for Items Sent Beyond MAUBET:	700	100.00%

These can be useful for **Collection Development** reports and planning.

Patron Status Report

The **Patron Status Report** provides a quick snapshot of Borrowing activity by the Status of the Patron. It also tracks the **Local Delivery Method** used to convey the item to the Patron, and computes an **Average Turnaround Time** for items by **Patron Status Code**.

This report appears at the top of Page 2 in the Compute Totals (Borrowing) Report:

13-Feb-2003 Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Dec-02) Page 2

Patron Status Report (using Local Delivery to Patron Methods)

Patron Status	TOTAL ITEMS	Status % Total	Physical Delivery: Mail	PkUp	Msgr	Inter-office	FedEx	Other	Electronic Delivery: Email(pdf)	(tiff)	Fax	Web (pdf)	(tiff)	Turnaround Avg # Days
No Status Assigned	87	52.73%		84	1			1					1	5.7
AHP														
DD														
FAC														
FELLOW	10	6.06%		9		1								6.
FLAG														
GRAD														
MD	62	37.58%	1	48					5	2	1	4	1	4.1
NURS	6	3.64%		5									1	6.8
OTH														
RES														
STAFF														
UND														

The Status, Suffix and Purpose Reports track the LOCAL Delivery Method---how it got to the patron.

Patron Suffix Report

Also on Page 2 of Compute Totals (Borrowing) is the **Patron Suffix Report**, which provides a snapshot of Borrowing activity by the type of Patron as revealed in the suffix (M.D., D.D.S., M.L.S., etc). It also tracks the **Local Delivery Method** used to convey the item to the Patron, by Suffix value, during the period specified, and computes an **Average Turnaround Time** for items by **Patron Suffix Value**:

Activity by Patron Suffix

Patron Suffix Report (using Local Delivery to Patron Methods)

Patron Suffix	TOTAL ITEMS	Suffix % Total	Physical Delivery: Mail	PkUp	Msgr	Inter-office	FedEx	Other	Electronic Delivery: Email(pdf)	(tiff)	Fax	Web (pdf)	(tiff)	Turnaround Avg # Days
No Suffix	87	52.73%		84	1			1					1	5.7
D.D.S.														
D.M.D.														
DNSC														
L.P.N.														
LiCSW	4	2.42%		3									1	6.8
M.D.	54	32.73%	1	41					5	1	1	4	1	4.5
M.L.S.														
M.S.														
M.S.L.S.														
M.S.W.														
Ph.D.	18	10.91%		16		1				1				4.2
Pharm.D.														
R.D.														
R.N.	2	1.21%		2										7.
R.Ph.														
R.R.T.														

The Status, Suffix and Purpose Reports track the LOCAL Delivery Method---how it got to the patron.

Purpose of Request Report

After the Patron Suffix Report on Page 2 of Compute Totals (Borrowing) is the **Purpose of Request Report**, which provides a snapshot of Borrowing activity by the purpose of request: Education, Grant-funded research, Other, Patient Care or Research. It also tracks the **Local Delivery Method** used to convey the item to the Patron, by purpose, during the period specified, and computes the **Average Turnaround Time** for items by **Purpose Code**. The Totals row at the bottom of this page reflects the Local Delivery Method Totals for the period specified.

Purpose of Request Report (using Local Delivery to Patron Methods)

Patron Purpose	TOTAL ITEMS	Purpose % Total	Physical Delivery: Mail	PkUp	Msgr	Inter-office	FedEx	Other	Electronic Delivery: Email(pdf)	(tiff)	Fax	Web (pdf)	(tiff)	Turnaround Avg # Days
No Purpose	161	97.58%	1	146				1	5	1	1	4	2	5.2
EDU														
GRA	2	1.21%				1				1				3.
OTH														
PC														
RES	2	1.21%			1								1	2.5
Totals:	**165**		**1**	**146**	**1**	**1**		**1**	**5**	**2**	**1**	**4**	**3**	
% of Totals:			**0.61%**	**88.48%**	**0.61%**	**0.61%**		**0.61%**	**3.03%**	**1.21%**	**0.61%**	**2.42%**	**1.82%**	

The Purpose Report tracks activity by purpose of request. Not much used at present, above. Also gives local del meth totals.

Library Group Report – By Del Method (Borrowing)

The **Library Group Report – By Delivery Method (Borrowing)** is found at the top of the **third page (or later) of the Compute Totals (Borrowing) Report**. It provides a breakdown of activity on the Borrow side **by Library Group** of the Lending Library. Since a single Library may belong to more than one Group, the Totals here may not match the total number of borrowed items for the period. The report breaks activity down by **Delivery Method** and gives the percentage of items filled for each Library Group that were delivered electronically, the percentage of activity with each Library Group within all Groups, and the average turnaround time by Library Group.

6-Jan-2003 **Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Dec-02)** **Page 3**

Library Group Report - By Del Method (Borrowing)

Library Group	TOTAL ITEMS	Group % Total	Physical Delivery: Mail	PickUp	Other	(Mono/A/V)	Web	Electronic Delivery: Ariel	Email	Fax	% Elect	Item Sent To: Library	Patron	Turnaround Avg # Days
OUT$	28	12.90%	18			(2)			7	3	36%	28		5.8
OUT														
CELLS	31	14.29%	22					1	3	5	29%	31		4.2
MA	59	27.19%	30						12	17	49%	59		2.3
R8$	24	11.06%	18						4	2	25%	24		6.3
R1$	19	8.76%	17			(1)			2		11%	19		7.9
R8	7	3.23%	6					1			14%	7		7.4
MA$	7	3.23%	7									7		8.6
BBLC	21	9.68%	8						9	4	62%	21		2.2
BBLFAX	15	6.91%	7							8	53%	15		.9
NLM														
R1	2	0.92%	2									2		9.5
MASSFAX	4	1.84%	1						2	1	75%	4		.3
Total in Groups:	**217**		**136**					**2**	**39**	**40**		**217**		
% of Totals:			**62.67%**					**0.92%**	**17.97%**	**18.43%**				

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]

[There were 168 Items not filled in-house (i.e., not by MAUBET). 22 of these were filled by Lenders with no assigned Library Group.]

If there are loans to Libraries that have not been assigned to a Library Group, the number of those items is listed at the end of the report.

Library Group Report - By Source (Borrowing)

The **Library Group Report – By Source (Borrowing)** is found at the bottom of the **third page (or later) of the Compute Totals (Borrowing) Report**. It provides a breakdown of activity on the Borrow side **by Source and Library Group** of the Lending Library. Since a single Library may belong to more than one Group, the Totals here may not match the total number of borrowed items for the period. The report breaks Group activity out by Source used, including: DOCLINE, LOANSOME DOC, OCLC, RLIN, Phone, Fax, Mail and Other. Item payment methods (broken out by EFTS, IFM and non-Electronic methods---typically, Invoices, Coupons, Deposit Accounts, Credits, etc.) are also listed by Group.

Library Group Report - By Source (Borrowing)

Library Group	TOTAL ITEMS	Source: DOCLINE	LDOC	OCLC	RLIN	Phone	Fax	Mail	Other	Item Payment Via: EFTS	IFM	Other
OUT$	28	21	5		1				1	6		13
OUT												
CELLS	31	28	2	1								
MA	59	52	3	1		1	1		1			
R8$	24	20	4							15		
R1$	19	19								16		
R8	7	7										
MA$	7	7								2		
BBLC	21	18	1			1	1					
BBLFAX	15	14							1			
NLM	17	13	3						1			12
R1	2	2										
MASSFAX	4	3	1									
Total in Groups:	**234**	**204**	**19**	**2**	**1**	**2**	**2**		**4**	**39**		**25**
% of Groups Totals:		**87.18%**	**8.12%**	**0.85%**	**0.43%**	**0.85%**	**0.85%**		**1.71%**	**16.67%**		**10.68%**

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]

Loansome Doc Filled In-House Report

The **Loansome Doc Filled In-House Report** lists each item filled for a Loansome Doc Patron by your library. These items are not included in any of the other reports, except for Compute Totals and the various Patron and Dept Detailed and Summary Reports (where they are included along with the LDs received from other libraries, but there's no distinction between those filled in-house and those received via ILL). This is an itemized list of all your fills for the period, with Patron Names, and including No Charge items (which would not appear on Patron Bills). The format is almost identical to the Detailed Borrow Report, except that the LD Patron appears in the Lender column, the Charge referred to is the Local Charge, and the items are sorted by Patron Name within the report (like the Detailed Borrow Report, there is also a Total at the end of the printout):

Loansome Doc Filled In-House

01-Jan-02 to 15-Apr-02

15-Jun-2002 **Beth Israel Deaconess Medical Center (01-Jan-02 to 15-Apr-02)** **Page 1**

Item	LD Patron	ReqNo	Date	Title	Citation	Local Chrg
1	Daly, Jay	6812249	15-Apr-02	2001 Canadian J community mental health	Winter;(3 Suppl):41-52	$4.00
2	Stevenson,	69944058	15-Apr-02	2000 Supportive care in cancer	May;8(3):215-22	$4.00
Total 2 Items From Beth Israel Deaconess Medical Center					**Total Charged By MAUBET:**	**$8.00**
TOTAL ALL ITEMS: 2				**TOTAL LIBRARIES: 1**	**TOTAL ALL CHARGES:**	**$8.00**

Copy Service Report (By Patron)

The **Copy Service Report (By Patron)** lists each item filled for a Copy Service run by your library. These items are not included in any of the other reports, except for a total in Compute Totals. This is an itemized list of all your jobs for the period, with Patron Names, and including the **number of pages** for each copy item. The format is almost identical to the Loansome Doc Filled In-House Report, except for the column with the calculated number of pages.

Copy Service Report (By Patron)
01-Jan-02 to 15-Apr-02

15-Jun-2002 **Beth Israel Deaconess Medical Center (01-Jan-02 to 15-Apr-02)** **Page 1**

Item	Patron	JobNo	Date	Title	Citation	Pages	Local Chrg
1	Daly, Jay	COPY2	15-Apr-02	1999 J behavioral health services resear	Nov;26(4):442-50	9	$4.00
2	Daly, Jay	COPY1	15-Apr-02	1995 Quality of life research	Apr;5(2):235-41	7	$4.00
3	Stevenson,	COPY4	15-Apr-02	1996 J biosocial science	Oct;28(4):463-79	17	$4.00
4	Stevenson,	COPY3	15-Apr-02	1999 J nursing measurement	Spring;7(1):35-45	11	$4.00
Total 4 Items From Beth Israel Deaconess Medical Center					**Total Charged By MAUBET:**		**$16.00**
TOTAL ALL ITEMS: 4				**TOTAL PAGES: 44**	**TOTAL ALL CHARGES:**		**$16.00**

List of Patron (or Dept) Invoices Outstanding Report

This is also available on the Reports, Borrowed Items Menu, as well as the Local Billing Menu and includes all invoices generated during the period specified that have not been paid, or have received only partial payment.

The Local Billing Menu Bar choice shows a choice for both **Patron Invoices Outstanding** and **Dept Invoices Outstanding** (which includes Cost Center Reports).

Lists of Invoices Outstanding include all invoices generated during the period specified that have not been paid, or have received only partial payment. The Patron List has the following format:

This list for Patrons includes the Patron's Last Name, as a note, since the Inv No. is based on the Patron No.; Invoices can be reprinted from the Local Billing Grid's Local Invoice Col.

List of Patron Invoices Outstanding
01-Nov-02 to 28-Feb-03

12-Feb-2003 **Beth Israel Deaconess Medical Center (01-Nov-02 to 28-Feb-03)** **Page 1**

Inv #	*Invoice Date*	*Invoice No.*	*Inv Total*	*Paid*	*Paid Date*	*Balance*
1 (Frangioni)	08-Nov-02	P1040 0004	$10.00			$10.00
2 (Kerr)	08-Nov-02	P1058 0005	$5.00			$5.00
Totals for 08-Nov-02: 2			**$15.00**			**Balance: $15.00**
1 (Folcarelli)	07-Feb-03	P66 0008	$10.00			$10.00
Totals for 07-Feb-03: 1			**$10.00**			**Balance: $10.00**
1 (Du Buske)	08-Feb-03	P1051 0009	$15.00			$15.00
Totals for 08-Feb-03: 3			**$15.00**			**Balance: $15.00**
TOTAL INVOICES: 4		**TOTAL INVOICED: $40.00**				**Balance: $40.00**

Invoices are broken out by the date the Invoice was sent.

The Dept and Cost Center List is the same, but without the Patron Last Name, since the Dept Abbreviation is embedded in the Invoice Number itself:

Invoices can be reprinted by searching for the Inv No. in the Local Billing Grid and clicking into the Local Invoice column

List of Dept/Cost Center Invoices Outstanding
01-Jan-03 to 28-Feb-03

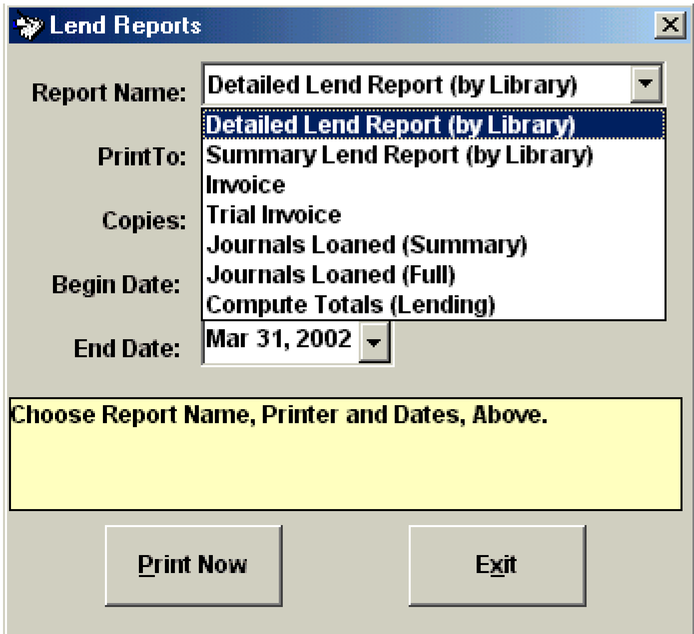
12-Feb-2003 **Beth Israel Deaconess Medical Center (01-Jan-03 to 28-Feb-03)** **Page 1**

Inv #	*Invoice Date*	*Invoice No.*	*Inv Total*	*Paid*	*Paid Date*	*Balance*
1	07-Feb-03	DBWEL 0001	$26.00			$26.00
2	07-Feb-03	DNEPH 0002	$16.00			$16.00
Totals for 07-Feb-03: 2			**$42.00**			**Balance: $42.00**
TOTAL INVOICES: 2		**TOTAL INVOICED: $42.00**				**Balance: $42.00**

This list can be used to reprint a second notice for selected invoices. A more automated process for generating second notices is still planned for some time in the future.

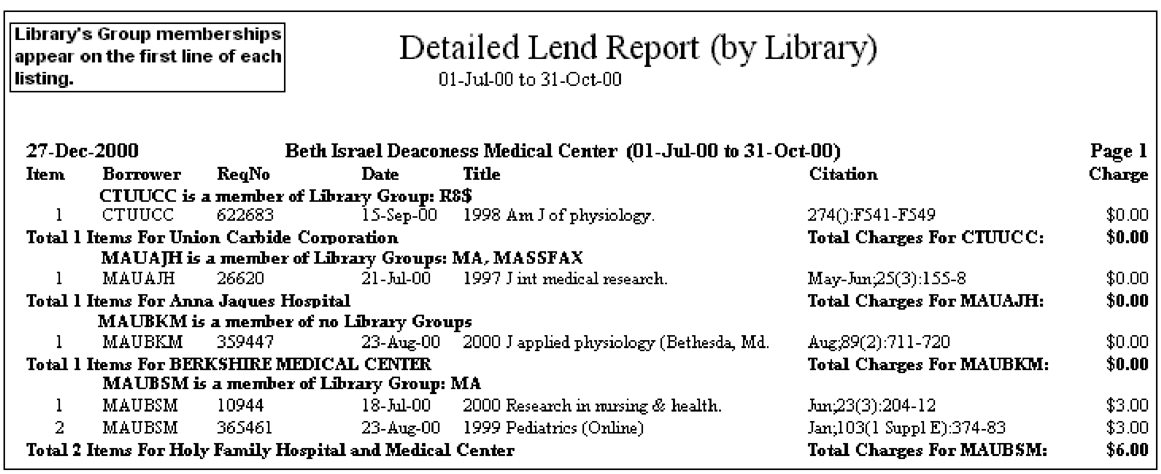
Lend Reports

The **Lend Reports form** gives choices for Report Name, Printer to print to (including Print Preview), Number of Copies to print, and Dates to include. Print Preview is always a good first choice, to get an idea of how many records will be sent to the printer.



Detailed Lend Report

There are a number of basic Lend side reports included in QuickDOC. The first is the **Detailed Lend Report**, which prints item-level information for each request filled during the period specified. The first line of each Library's activity includes a **list of the Library Groups** to which that Library belongs. The format is as follows:



Library's Group memberships appear on the first line of each listing.

Detailed Lend Report (by Library)
01-Jul-00 to 31-Oct-00

27-Dec-2000 — Beth Israel Deaconess Medical Center (01-Jul-00 to 31-Oct-00) — Page 1

Item	Borrower	ReqNo	Date	Title	Citation	Charge
	CTUUCC is a member of Library Group: R8$					
1	CTUUCC	622683	15-Sep-00	1998 Am J of physiology.	274():F541-F549	$0.00
Total 1 Items For Union Carbide Corporation					**Total Charges For CTUUCC:**	**$0.00**
	MAUAJH is a member of Library Groups: MA, MASSFAX					
1	MAUAJH	26620	21-Jul-00	1997 J int medical research.	May-Jun;25(3):155-8	$0.00
Total 1 Items For Anna Jaques Hospital					**Total Charges For MAUAJH:**	**$0.00**
	MAUBKM is a member of no Library Groups					
1	MAUBKM	359447	23-Aug-00	2000 J applied physiology (Bethesda, Md.	Aug;89(2):711-720	$0.00
Total 1 Items For BERKSHIRE MEDICAL CENTER					**Total Charges For MAUBKM:**	**$0.00**
	MAUBSM is a member of Library Group: MA					
1	MAUBSM	10944	18-Jul-00	2000 Research in nursing & health.	Jun;23(3):204-12	$3.00
2	MAUBSM	365461	23-Aug-00	1999 Pediatrics (Online)	Jan;103(1 Suppl E):374-83	$3.00
Total 2 Items For Holy Family Hospital and Medical Center					**Total Charges For MAUBSM:**	**$6.00**

with appropriate Totals columns at the end.

Summary Lend Report

The **Summary Lend Report** lists total activity with each Borrower during the period in question: total items and the total amount charged.

Summary Lend Report (by Library)

01-Sep-02 to 31-Dec-02

7-Jan-2003 **Beth Israel Deaconess Medical Center (01-Sep-02 to 31-Dec-02)** Page 1

Library No.	Borrower LIBID		Items Loaned	Charge	Lib #
1	MAUBKM	BERKSHIRE MEDICAL CENTER (CELL5, MA)	1	$0.00	1
2	MAUBVB	Va Med Ctr Brockton/Med Library II (BBLC, MA)	1	$0.00	2
3	MAUDAV	ABIOMED Incorported (CELL5, MA)	1	$0.00	3
4	MAUERI	Eye Research Institute (CELL5, MA)	1	$0.00	4
5	MAUHCM	Children's Hospital (BBLC, MA)	1	$0.00	5
6	MAUHSL	St Lukes Hospital (CELL5, MA)	2	$0.00	6
7	MAUHYA	CAPE COD HOSPITAL (CELL5, MA, MASSFAX)	1	$0.00	7
8	MAULCB	LAHEY CLINIC (BBLC, MA)	1	$0.00	8
9	MAUMAH	Mount Auburn Hospital (BBLC, MA)	1	$0.00	9
10	MAUMHC	MetroWest Medical Center (BBLFAX, MA)	6	$0.00	10
11	MAUMLW	Mary Lane Hospital (CELL5, MA)	1	$3.00	11
12	MAUMRD	SPAULDING REHABILITATION HOSPITAL (MA$)	2	$6.00	12
13	MAUNBP	New England Baptist Hospital (BBLC, MA)	1	$0.00	13
14	MAUNEO	NEW ENGLAND COLLEGE OF OPTOMETRY (BBLC, MA)	4	$0.00	14
15	MAUSEF	St. Elizabeth's Medical Center (BBLFAX, MA)	2	$0.00	15
16	MAUTUV	Tufts Univ Veterinary School/Libra (CELL5, MA)	2	$0.00	16
17	MAUVBD	EDITH N ROGERS MEMORIAL VA HOSPITAL (MA$)	2	$6.00	17
18	MAUZSL	Dana-Farber Cancer Institute (BBLFAX, MA)	6	$0.00	18
19	MEUMAN	MAINE MEDICAL CENTER (R8$)	1	$11.00	19
20	NHUPNH	PORTSMOUTH REGIONAL HOSPITAL (CELL5, R8)	1	$0.00	20

Library Groups appear in parentheses, if there are groups assigned to that library.

TOTAL LIBRARIES: 20 **TOTAL ITEMS: 38** **TOTAL CHARGES: $26.00**

Journals Loaned (Summary) Report

The **Journals Loaned (Summary) Report** lists each Journal Title loaned during the period in question, along with the number of times it was loaned and the ISSN.

Journals Loaned (Summary)

01-Jan-01 to 31-Dec-01

17-Apr-2002 **Beth Israel Deaconess Medical Center (01-Jan-01 to 31-Dec-01)** Page 1

Journal#	# Loaned	Jrnl Title	ISSN
1	1	AARP bulletin	1044-1123
2	1	Academic medicine	1040-2446
3	1	ACT ADAPT AGING	
4	2	Activities, adaptation aging	0192-4788
5	2	Adv Data	0147-3956
6	1	Advances in long-term care	1053-0606
7	7	Age ageing	0002-0729
8	2	Ageing society	0144-686X
9	2	Aging	0002-0966
10	56	Aging (Milano)	0394-9532
11	2	Aging today	1067-8379
12	1	AHRQ research activities / Agency for Healthcare R	
13	4	AIDS (London, England)	0269-9370
14	2	AIDS clinical care	1043-1543
15	32	Alzheimer disease associated disorders	0893-0341
16	3	Am J Alzheimer's care related disorders research	0895-5336
17	2	Am J Alzheimer's disease	1082-5207

The left hand column is counting the titles as they are printed. At the end of the report is a general total:

208	1	Thorax	0040-6376
209	2	Transfusion	0041-1132
210	1	Vital health statistics. series 1: programs colle	0083-2014
211	3	Vital health statistics. series 13: data from nat	0083-2006
212	1	World J surgery	0364-2313
213	1	Zeitschrift fur gerontologie und geriatrie	0948-6704

TOTAL JRNLS: 213 **TOTAL ITEMS: 849**

Journals Loaned (Full) Report

The **Journals Loaned (Full) Report** lists each Journal Title loaned during the period in question, but also includes a line for each item, including the Borrowing Library, the Year of publication, and the ISSN.

Journals Loaned (Full)

01-Jan-01 to 31-Dec-01

17-Apr-2002 **Beth Israel Deaconess Medical Center (01-Jan-01 to 31-Dec-01)** **Page 1**

Journal#	# Loaned	Borrower	Year	Jrnl Title	ISSN
1	1	NYUMFB	1994	AARP bulletin	1044-1123
2	1	MAUZSL	2001	Academic medicine	1040-2446
3	1	NYUVAV	2000	ACT ADAPT AGING	
4	1	NHULRL	1999	Activities, adaptation aging	0192-4788
	2	NJUKMH	1997		
5	1	PAUBYH	2000	Adv Data	0147-3956
	2	NJUDAI	1992		
6	1	PAUMEC	1991	Advances in long-term care	1053-0606
7	1	MAUHLO	1997	Age ageing	0002-0729
	2	NJUMSG	1986		
	3	NYUZGJ	1986		
	4	PAUAEP	1983		
	5	PAUMHP	1980		
	6	PAUPMM	1977		
	7	NYUNCN	1973		

This report can be fairly lengthy, with a line for each item loaned. The individual numbers in the second column (**# Loaned**) provide the subtotal for each Journal during the printout. This report also includes a total at the end of the report:

17-Apr-2002		Beth Israel Deaconess Medical Center (01-Jan-01 to 31-Dec-01)			Page 17
Journal#	**# Loaned**	**Borrower**	**Year**	**Jrnl Title**	**ISSN**
206	1	AZUARI	1999	Structural equation modeling	1070-5511
	2	ILUEVE	1999		
	3	ONCTAW	1996		
	4	MOUVHC	1996		
	5	WAUWAS	1995		
	6	TXUTSA	1995		
	7	WAUWAS	1994		
207	1	MAUNBP	2000	Surgery	0039-6060
208	1	MAUCOM	1995	Thorax	0040-6376
209	1	MEUFBR	2001	Transfusion	0041-1132
	2	MEUFBR	2001		
210	1	PAUEMB	1967	Vital health statistics. series 1: programs colle	0083-2014
211	1	PAUAEP	2001	Vital health statistics. series 13: data from nat	0083-2006
	2	NYUCIH	2001		
	3	PAUMGE	1998		
212	1	MAUMAH	1994	World J surgery	0364-2313
213	1	NJUKMH	1999	Zeitschrift fur gerontologie und geriatrie	0948-6704
TOTAL ALL ITEMS: 849				**TOTAL JRNLS: 213**	

Compute Totals (Lending) Report

The **Compute Totals (Lending) Report** provides a quick snapshot of Lending activity in various categories, such as **Item Source**, **Delivery Method**, **Type of Item**, etc. . It gives the percentage of items on each Source that were delivered electronically, and also calculates percentages of activity during the period sepcified, and computes an **Average Charge per Item** for that period. The report also gives a subtotal within each Source if any of those items were **monographs, journals, e-journals** or **audio-visuals**. A typical first page would look like this:

Compute Totals (Lending)

01-Jan-02 to 31-Dec-02

This column tracks the % from each Source that was delivered electronically.

16-Jan-2003		Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Dec-02)											Page 1
Item Source	**TOTAL ITEMS**	**Source % Total**	**Physical Delivery: Mail**	**PickUp**	**Other**	**(Mono/ A/V)**	**Electronic Delivery: Web**	**Ariel**	**Email**	**Fax**	**% Elect**	**Item Sent To: Library**	**Patron**
DOCLINE	142	99.30%	49							93	65%	142	
OCLC													
RLIN													
Mail													
Telephone													
Fax													
Other	1	0.70%	1			(1)						1	
TOTAL FILLED:	**143**		**50**							**93**		**143**	
% of Totals:			**34.97%**							**65.03%**			

(Monograph and AV subtotals for each line appear here.

Tracking by Item Sent To is not yet available in 2.1.x

	Physical	**Electronic**	
TOTAL Physical & Electronic FILLS:	**50**	**93**	**143**
% of Totals:	**34.97%**	**65.03%**	

Breakout by Type includes E-Journals

By Type: Jrnls:	**141**	**E-Jrnls: 1**	**Monographs: 1**	**AV:**	**Originals:**	**Copies: 143**	**Rush:**
% of Totals:	**98.60%**	**0.70%**	**0.70%**			**100.00%**	

TOTAL ITEMS:	**Filled**	**Rejected**	**In Process**	**Grand Total**
	143	**42**	**1**	**186**
% of Totals:	**76.88%**	**22.58%**	**0.54%**	

The first page of Compute Totals (Lending) also shows a report of the methods of **Billing information** for the period, and **amounts billed to Libraries** (or to be billed), with categories for **EFTS**, **IFM**. **Invoice, Deposit Acct, Other, Not Yet Billed** and **Free**.

BILLING. Items Billed Via:	EFTS	IFM	Invoice	Deposit Acct	Other	Not Yet Billed	Free
	17	2	1		1	1	120
Est. $ By Method:	$51.00	$14.00	$11.00		$3.00	$3.00	$0.00
% of Filled Items:	11.97%	1.41%	0.70%		0.70%	0.70%	84.51%
TOTAL Charged: $82.00					Avg Chrg/Item: $0.58		

This can be a quick way to check the amounts you receive (or should receive) from various Billing methods.

In addition, the Lend report also lists **Rejection Reasons** for those items that were not filled, along with the percentage of all rejections the listed Reason represented.

Report on Reasons for Rejection of the 42 Items Received But Not Filled:

REJECTION REASONS:	Code	Description	# of Items	% of Total Rej.
	BDY	At Bindery	2	4.76%
	CAN	Cancelled	2	4.76%
	COP	Needs Copyright Info	1	2.38%
	CST	Cost exceeds limit	2	4.76%
	INC	Not found as cited	1	2.38%
	LAC	Lacking (Issue/Vol)	9	21.43%
	NYR	Not yet received	1	2.38%
	OTH	Other	24	57.14%

These can be useful for **Collection Development** reports and planning.

Library Group Report – By Del Method (Lending)

The **Library Group Report – By Delivery Method (Lending)** is found on the second page of the Compute Totals (Lending) Report, at the top. It provides a breakdown of activity on the Lend side by Library Group of the Borrowing Library. Since a single Library may belong to more than one Group, the Totals here may not match the total number of loaned items for the period. The report breaks activity down by **Delivery Method** and gives the percentage of items filled for each Library Group that were delivered electronically, as well as the percentage of activity with each Library Group within all Groups.

6-Jan-2003 Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Dec-02) Page 2

Library Group Report - By Del Method (Lending)

Library Group	TOTAL ITEMS	Group % Total	Physical Delivery: Mail	PickUp	Other	(Mono/ A/V)	Web	Electronic Delivery: Ariel	Email	Fax	% Elect	Item Sent To: Library	Patron
OUT$													
OUT													
CELL5	44	17.32%	30			(1)				14	32%	44	
MA	106	41.73%	28							78	74%	106	
R8$	1	0.39%	1									1	
R1$													
R8	9	3.54%	8			(1)				1	11%	9	
MA$	18	7.09%	13							5	28%	18	
BBLC	33	12.99%	3							30	91%	33	
BBLFAX	36	14.17%	3							33	92%	36	
NLM													
R1													
MASSFAX	7	2.76%	1							6	86%	7	
Total in Groups:	**254**		**87**							**167**		**254**	
% of Totals:			**34.25%**							**65.75%**			

These are the numbers of Total Items that were monograph or A-V

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]

[There were also 9 items loaned to Libraries with no assigned Library Group.]

If there are loans to Libraries that have not been assigned to a Library Group, the number of those items is listed at the end of the report.

Library Group Report - By Source (Lending)

The **Library Group Report – By Source (Lending)** is found at the bottom of the **second page (or later) of the Compute Totals (Lending) Report**. It provides a breakdown of activity on the Lend side **by Source and Library Group** of the Borrowing Library. Since a single Library may belong to more than one Group, the Totals here may not match the total number of loaned items for the period. The report breaks Group activity out by Source used, including: DOCLINE, OCLC, RLIN, Phone, Fax, Mail and Other. **Item payment methods** (broken out by EFTS, IFM and non-Electronic methods---typically, Invoices, Coupons, Deposit Accounts, Credits, etc.) are also listed by Group.

Library Group Report - By Source (Lending)

Library Group	TOTAL ITEMS	Source: DOCLINE	OCLC	RLIN	Phone	Fax	Mail	Other	Item Payment Via: EFTS	IFM	Other
OUT$											
OUT											
CELL5	44	43						1	1		
MA	106	106							3	2	
R8$	1	1								1	
R1$											
R8	9	8						1			
MA$	18	18							14	2	1
BBLC	33	33									
BBLFAX	36	36								2	
NLM											
R1											
MASSFAX	7	7									
Total in Groups:	**254**	**252**						**2**	**18**	**7**	**1**
% of Groups Totals:		**99.21%**						**0.79%**	**7.09%**	**2.76%**	**0.39%**

'Other' payments include Invoices, Dep Accts, etc.

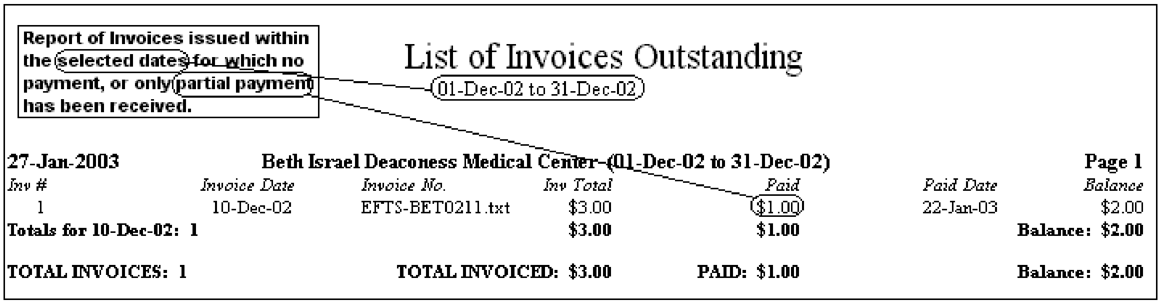
[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]

Library Invoices

You can also print **Invoices from the Reports Menu**, although most will use the Billing, EFTS Menu for this.

List of Invoices Outstanding Report

This is also available on the Reports, Loaned Items Menu, as well as the Billing, EFTS Menu. This report includes all invoices generated during the period specified that have not been paid, or have received only partial payment. The list has the following format:



List of Invoices Outstanding
01-Dec-02 to 31-Dec-02

27-Jan-2003	Beth Israel Deaconess Medical Center-(01-Dec-02 to 31-Dec-02)					Page 1
Inv #	*Invoice Date*	*Invoice No.*	*Inv Total*	*Paid*	*Paid Date*	*Balance*
1	10-Dec-02	EFTS-BET0211.txt	$3.00	$1.00	22-Jan-03	$2.00
Totals for 10-Dec-02: 1			**$3.00**	**$1.00**		**Balance: $2.00**
TOTAL INVOICES: 1			**TOTAL INVOICED: $3.00**	**PAID: $1.00**		**Balance: $2.00**

This list can be used to reprint a second notice for selected invoices. A more automated process for generating second notices is still planned for some time in the future.

Reports after Imports

QuickDOC produces various reports after importing data, primarily after QDPortal Imports or Old QD Data (DOS Ver) Imports.

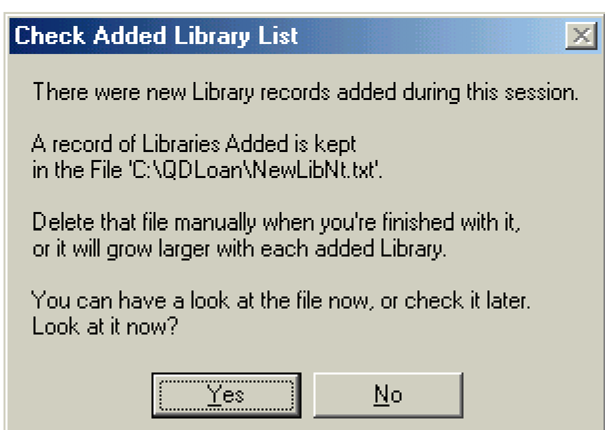
QDPortal Import Reports

QDPortal imports produce voluminous reports on new Libraries and Patrons Created, as well as smaller reports of anomalies encountered.

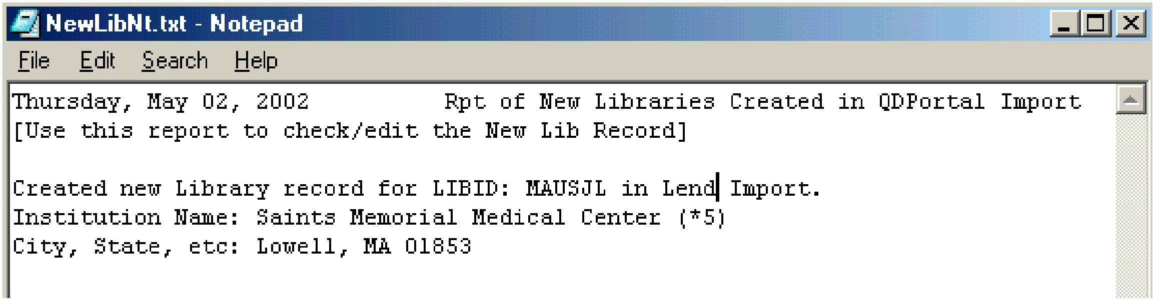
Libraries

QDPortal will report all instances where a Library was created during the Import Session. This is to alert you to the creation and give you a chance to edit that Library immediately, to be sure that it reflects the Charge Profile, Groups affiliation, and other values that it should reflect.

Whenever a Library record is created, in either Receipts or Borrows, an entry is made in the **NewLibNt.txt** file (located in the C:\QDLoan folder of the machine running at the time) of the Library creation. When the import session is complete, if a new Library record has been created during that session, you'll see a Message Box with the following message:



If you click Yes, Notepad will open with the Libraries that have been added listed:



You can print a copy of this in Notepad, to use when editing the new Library records. Once you've printed the list, either delete the file C:\QDLoan\NewLibNt.txt or delete all its contents while in Notepad; otherwise any new Libraries will be added onto the end of this list and the file will continue to grow.

Patrons

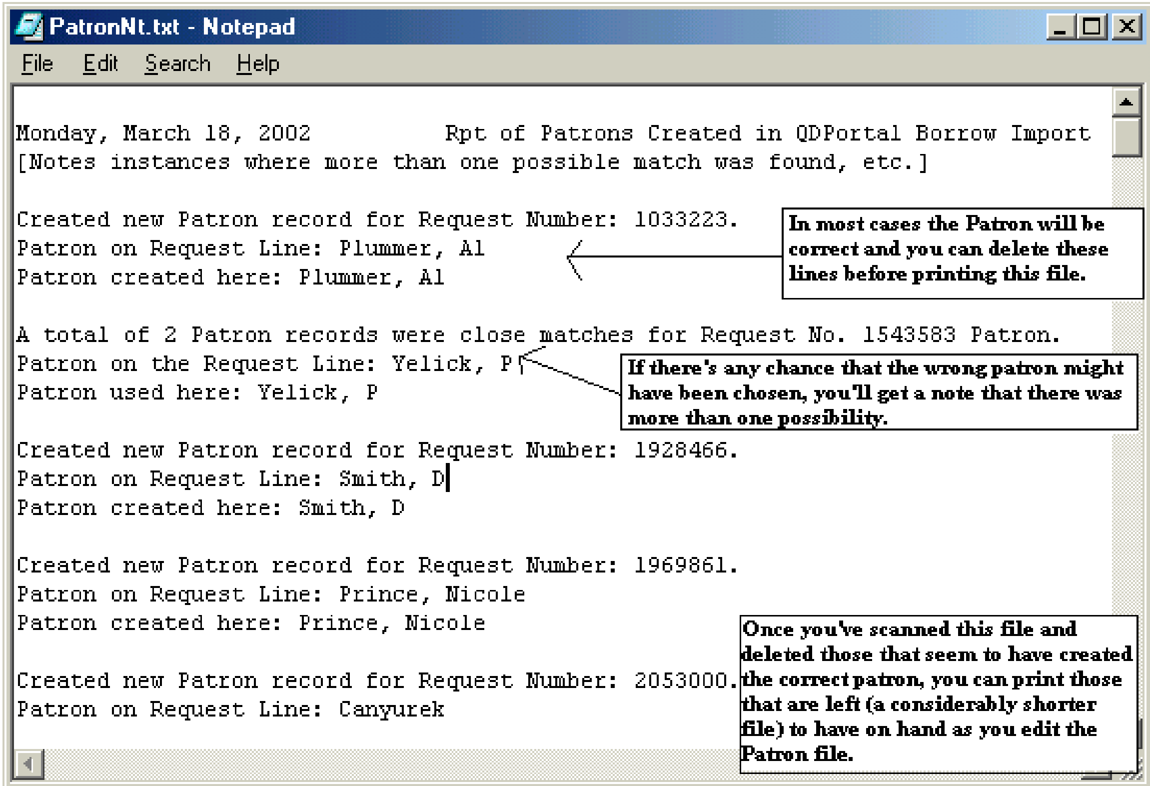
This is the most voluminous of the QDPortal Import Reports, at least during an initial import where data has been saved in QDPortal for some time before QuickDOC has been installed. It is a report of **ALL NEW PATRONS CREATED DURING THIS IMPORT SESSION**.

Whether the Patron appears problematic or not, an entry is made in the **PatronNt.txt** file (located in the C:\QDBorrow folder of the machine running at the time) of the Patron's creation. A note is also made if the Patron imported from the DOCLINE Request isn't identified by a Patron Number (the number in brackets that has identified the Patron Record in both the old DOS QD and the new QD4Win), which usually appears at the end of the Patron Name field in the format: [1234].

In most cases, these New Patrons will have been properly assigned as to Last Name, First Name, etc., but this report is to permit the editing of those whose newly made records are not accurate. After each QDPortal session where a Patron was created, you'll be asked whether you want to print this report now or save for later.

For normal QDPortal Imports, where there will be only a few new Patrons, choose Print Now. For any larger import, where you think you might need to spend some time checking that Patrons were properly assigned, don't print the file. Save it until later, when you can edit it and use it to guide you in fixing anything that needs to be fixed in the Patrons Table.

The file **C:\QDBorrow\PatronNt.txt** looks like this:



The best way to work with this file is to open it in Notepad (or WordPad) and inspect it, deleting those entries that are obviously correct, leaving only those that deserve further exploration. In the case above, the Plummer entry seems okay, so you can delete those three lines (plus the space before the next line). Same with all the other lines visible, above, except for the Yelick line.

This line tells you that there are more than one Yelicks in the database, and that the Import process has chosen this one (Yelick, P) as the most appropriate. In this case, the guess is obviously correct, but it's still a notice that you might want to check the OTHER Yelick, to see whether its items should be joined with those for this Patron.

Other short reports that may appear in the C:\QDBorrow folder include:

NoLDXUpd.txt This report lists Loansome Doc Updates saved in QDPortal that didn't find a record in the database to update. Print this out periodically and delete it. The report can then be used, if necessary, to add the item to the database, assuming the bibliographic data is available, but anything not filled can be ignored. Oftentimes, the record is there now, but wasn't in the db at the time of the update, and can be manually updated from the report.

Old QD Data (DOS Ver) Reports

Libraries

As it's working, the import process produces a **Report of Libraries Imported From Old QD**, so you can double-check its decisions and, if necessary, correct them. The report has this format:

```
Monday, December 18, 2000          Report of Libraries Imported From Old QD - MAUBET

Added Old QD Library WYETH-AYERST RESEARCH (S-101)    Old Code: ACY
     To New DOCUSER Record: NYUACY; Wyeth Ayerst Research (S-101)
```

```
Added Old QD Library ADDISON GILBERT HOSPITAL   Old Code: ADD
    To Closest DOCUSER Match: MAUAGG; Addison Gilbert Hospital

Added Old QD Library US AGENCY FOR INTERNAT'L DEVELOP.   Old Code: AID
    To a Made-Up DOCUSER Value.  New Value: DCUAID; Us Agency For Internat'l Develop.

Added Old QD Library AMERICAN MEDICAL ASSOCIATION   Old Code: AMA
    To Closest DOCUSER Match: ILUAMA; American Medical Association

Added Old QD Library AMESBURY HOSPITAL/ATTN: ADMINISTRA   Old Code: AME
    To a Made-Up DOCUSER Value.  New Value: XXXAME; Amesbury Hospital/Attn: Administra

Added Old QD Library COLLEGE OF PHYSICIANS AND SURGEONS   Old Code: BCP
     To New DOCUSER Record: BCCBCP; College Of Physicians And Surgeons Of British Colu

Added Old QD Library CORNELL UNIV MED COLLEGE/SAMUEL WO   Old Code: BYC
     To New DOCUSER Record: NYUCOR; Weill Medical College of Cornell University
```

In the report above:

1. The **first item** reports what is no doubt a **correct transfer**. The old code was ACY and the new is NYUACY. The old Institution name (in CAPS on the first line) matches the new name as retrieved from the DOCUSER file.
2. The **second item** shows a case where the code in old QD doesn't match that found in the new, but there's a **close enough match** to suggest the correct entry, so the new record MAUAGG is assigned.
3. The **third item** wasn't found in DOCUSER, so a **new LIBID is invented**, using the State/Province captured from old QD. No other DCUAID exists, so that value is assigned.
4. The **fourth item** found a **likely match** for AMA.
5. The **fifth** was for a Library in old QD with **no address information**. Since we can't tell which state or province this library is in, and we don't have an old LIBID (in the 12345A format---it's probably one of those 00000A Libraries), the only place to go is **XXX plus the old code**.
6. The **sixth** found the correct Canadian library (the old record no doubt had the correct old LIBID).

Finally, the **last item** might suggest a check. The old Cornell was filed under BYC, but it had a real LIBID (10021A), which was successfully looked up in the new DOCUSER file. This produced the hit on new LIBID NYUCOR. But the two names are sufficiently different that it might be wise to double-check before accepting this choice uncritically, just in case the old LIBID was entered incorrectly (although I think that this one was okay, but haven't had time to check!). This file will be located in your QuickDOC Program folder under the name of **LibrImp.txt**.

Loans

As it's working, the import process produces a **Report of Loans Imported From Old QD**, so you can double-check its decisions and, if necessary, correct them. The report has this format:

```
Wednesday, December 20, 2000          Report of Loans Imported From Old QD - MAUBET

More than one match was found while searching ISSN for NATURE.
   Chosen Title: Nature.   ISSN: 0028-0836

Could not find Library for old Request Number LOW-9711204187 in file.
   Filed instead with Orphan Borrower XXXNOT.
```

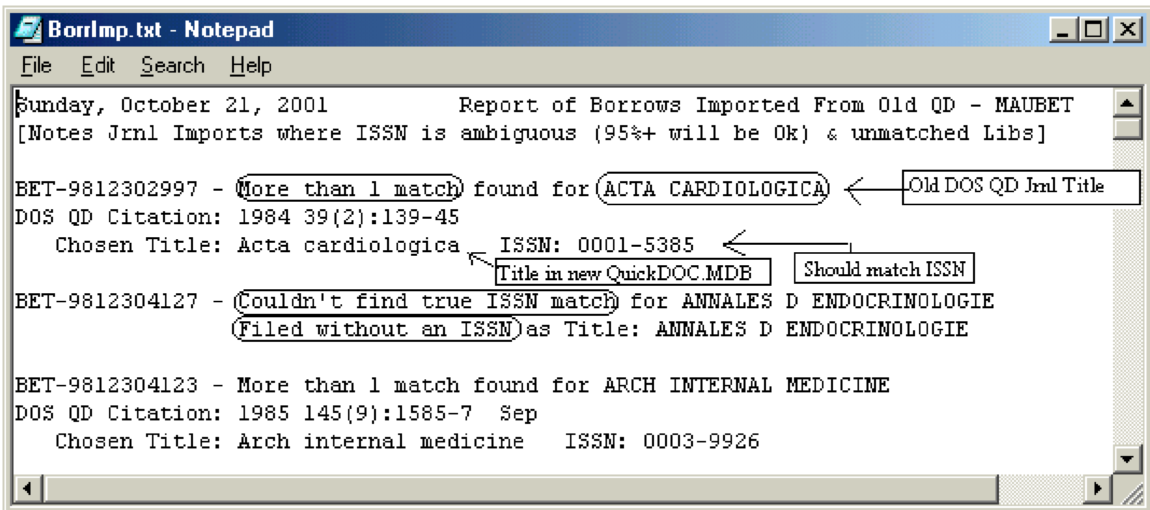
This report captures 2 situations:

1. If there was more than one match on a journal title, it lets you know, and
2. If it can't find an old Borrower in the new file it assigns it to a default value of **XXXNOT**.

You can reassign these later, after creating the Borrower record. This file will be located in your QuickDOC Program folder under the name of **LoanImp.txt**.

Borrows

As it's working, the import process produces a **Report of Borrows Imported From Old QD**, so you can double-check its decisions and, if necessary, correct them. The report has this format:



Use this to check for Journal Matches in the new QuickDOC.MDB database. If the ISSN and Journal seem wrong, you have the request number to use to re-assign it properly. This file will be located in your QuickDOC Program folder under the name of **BorrImp.txt**.

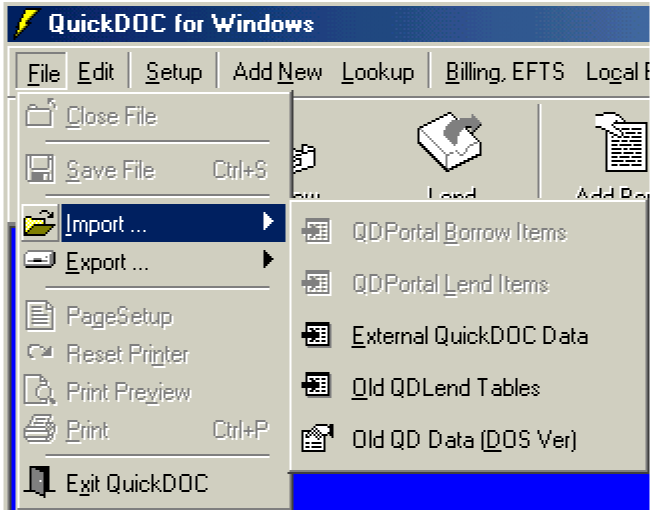
Imports and Exports

QDPortal Imports

QDPortal Imports occur when you click the **Import QDPortal** button in QuickDOC. Alternatively, you can **import just the QDPortal Borrow** items by clicking the **QDPortal Borrow Items** choice under **Import** on the **File Menu**. Or **import just the QDPortal Lend** items by clicking the **QDPortal Lend Items** choice under **Import** on the **File Menu**. For a complete description of QDPortal Import methods, see the **QuickDOC and QDPortal** section, above.

Import Menu

Access to the Import Menu is under the **File Menu** on the QuickDOC Menu Bar.



In addition to the alternate QDPortal Import methods, there are three other import choices:

- **External QuickDOC Data**
- **Old QDLend Tables**
- **Old QD Data (DOS Version)**

External QuickDOC.MDB Files

This choice is for **importing data held in QuickDOC.MDB files other than your central database file**. Particularly in cases where QuickDOC was first loaded on one computer (and the QDPortal Import data was transferred to the database stipulated by that installation) and then the database location was changed (either manually or by choice on another computer on the same network), there may still be unrecorded QDPortal captured items at the original database location that were never transferred to the central location (this should no longer happen, so long as the new location is chosen within QuickDOC, but who can ever be sure?).

Use this choice to check whether any QuickDOC.MDB files that are currently sitting on C: drives on any machines in your network have any items captured via QDPortal that are not currently residing in your central database.

Updates to QuickDOC also include an **Update Database under the name of QDUpd.MDB**, also located in the Program folder, which contains new data structures and data to be added to the central QuickDOC.MDB database when a new version is first run and the central database has not yet been upgraded (if you have more than one machine upgrading, then this activity will only occur during the first machine's update; other machines will find that the DB matches the version they're upgrading to, so no activity is necessary).

Upgrade All QuickDOC Machines at the Same Time. BTW, if you upgrade one machine on a network to the latest QuickDOC update, and that update includes a **database upgrade** (typically including new Fields, perhaps new Tables, and sometimes new data for Lookup Tables), upgrade any other machines on the same network (those running QuickDOC and QDPortal, of course) at that time as well. While most QuickDOC updates have not changed the database structure, and those that have changed the DB were done with an eye toward accommodating access from lesser QuickDOC versions, it's always safer to upgrade all machines using QuickDOC at the same time. Downloading the Install file (either Web-Install or Complete) to a local shared drive and then running the Install on that file from each machine using QuickDOC will prevent any missed communication.

If you suspect that you have a QuickDOC.MDB file sitting somewhere on your C: Drive that has data not currently saved in your central database, you can import it here.

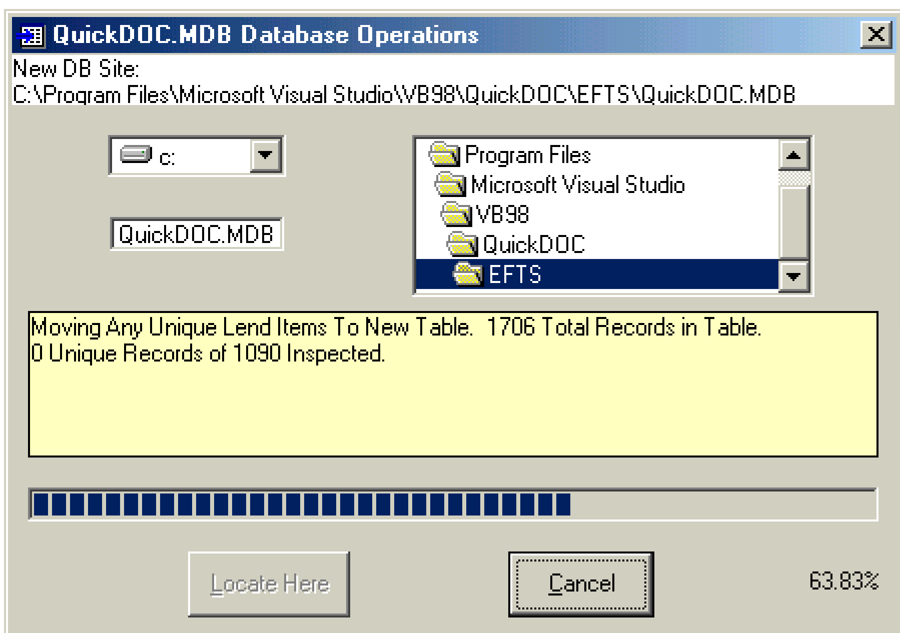
This utility will examine any QuickDOC.MDB file and, if it has data that doesn't exist in the central database, import those unique records, from any of the QuickDOC Tables, into the DB. You can select a DB to import as many times as you like: only NEW records will be imported to the central database.

If you want to use this method to import data from another Access 2000 type database, it must have the structure that is expected in a QuickDOC.MDB database. If you have a database named OtherDB.MDB---and it's in a proper QuickDOC.MDB structure---you must first copy this file (OtherDB.MDB) to filename QuickDOC.MDB in a folder different from that of the REAL QuickDOC.MDB, and then choose to **import External QuickDOC Data** from that file (QuickDOC.MDB, in the new location).

At this time, there's no provision for importing data from other data repositories (though this may change as time goes on).

Importing External QuickDOC Data uses the same form as is used to find and locate the current database. In this case, though, choose the QuickDOC.MDB file to import, rather than choosing the folder in which to locate the database. Steps are as follows:

1. Start up QuickDOC, and click 'File' and 'Import' from the Menu bar.
2. Choose 'External QuickDOC Data' to get to the Database Operations form.
3. Use the Directory list box to navigate to the Backup folder underneath QuickDOC. You should see "FOUND ONE HERE" with the file stats and the 'Import Data' button will be enabled.
4. Click the **Import Data button** and any records in this db that are not in the current db will be added. In addition, the old **db will be marked as "MOVED"** so that, if you check again in the future you'll get a message that the data was moved.



Since all records are checked first before being imported into QuickDOC.MDB, trying to import from a file that has already been imported does no harm. Nevertheless, it makes no sense to try importing files over and over again, so that files---once imported---are then marked "**MOVED**" and any subsequent attempts to import them pop up a Message Box with that information.

One final note regarding moving the QuickDOC.MDB:

ALWAYS USE THE MENU BAR 'Setup' and 'Locate QuickDOC.MDB' PROCEDURE TO MOVE THE DB! NEVER JUST COPY OR MOVE THE FILE ON ITS OWN, OUTSIDE OF THE PROGRAM.

While you will probably be able to recover if you do this (by finding it again under Setup, etc.), it's always safer to make the move within the program.

Old QDLend Tables

This choice is for **importing data held in QDLend.MDB files not automatically imported** when the initial transfer from QDLend (the interim Lend program) to QuickDOC was made.

In particular, there have been cases where **Library records were not fully transferred**, for some reason, during the initial import. Because Library records to match the Codes are necessary to maintain relationships in the database, the import process creates records anyway, using the LIBID to mark the record, for any Library where the import failed to create the record. The result is a list of imported **QDLend Libraries** that look like this:

ABCABCInstitution

ABCDEFInstitution, etc.

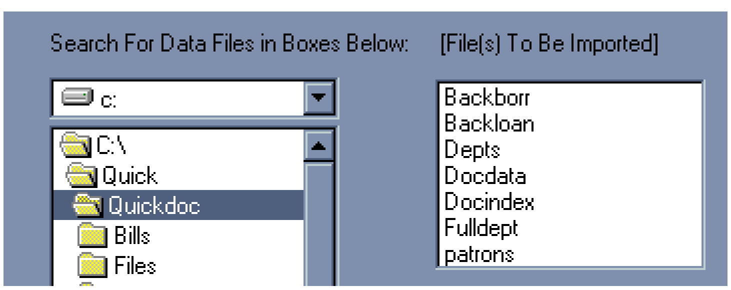
Using this import choice will re-create those Library records using the correct data from **QDLend.MDB**.

The process is the same as with the External QuickDOC.MDB databases, above, except that it will be looking for a QDLend.MDB, and the process should be much quicker, since the QDLend.MDB database was much smaller and had fewer database relationships than does QuickDOC.MDB.

Old QD Data (DOS Ver)

Use this to import data from the old DOS Version of QuickDOC, which was used with DOCLINE up until July 17, 2000.

The first time you choose to import data from Old QD, the program will need to be directed to the folder in which the old QD files reside (after the first time, it'll remember where to look). Use the typical file and directory search boxes to find the directory you're looking for. When you get there you'll see a list of old QD files appear in the File List Box, as shown below.



In order for QD4Win to be aware that the folder you navigate to has true old QD files, it looks first for two files which were in all old QD directories: **QDCOMMS** and **SETLIBID**. If it finds those, then it knows that any DOCDATA (Libraries) or BACKLOAN (Lends) files are correct ones. **If the folder you're trying to import from doesn't have these two files, then you need to copy them over as well as the back files, themselves**

Import Libraries from DOS Version

For your initial import, **first Import Libraries from old QD** by checking the **Libraries Check Box** and clicking the **Import Now button**. **It's necessary to get the Libraries first**, so that when you import the Lend data from old QD it will have Library (Borrower) records to refer to (otherwise, any record where the Borrower is not found will be assigned to a catch-all XXXNOT Library record, and there'll be much cleaning up to do).

The **Import Libraries routine tries to match the old QD Values with current DOCUSER values** first by searching under the old LIBID. If the **old LIBID was made up** (such as one of those 00000A values), it next tries searching for a likely match under Institution Name and State/Province. If no likely match occurs there, it next checks to be sure that there's no new DOCUSER record that has the same State-Country-Code combination and---if it looks clear---assigns the record that code. If that code might be problematic, the final choice is to use XXX plus the old 3-letter code, assuming it hasn't already been assigned to someone else.

As it's working, the import process produces a **Report of Libraries Imported From Old QD**, so you can double-check its decisions and, if necessary, correct them. The report has this format:

```
Monday, December 18, 2000          Report of Libraries Imported From Old QD - MAUBET

Added Old QD Library WYETH-AYERST RESEARCH (S-101)   Old Code: ACY
     To New DOCUSER Record: NYUACY; Wyeth Ayerst Research (S-101)

Added Old QD Library ADDISON GILBERT HOSPITAL   Old Code: ADD
    To Closest DOCUSER Match: MAUAGG; Addison Gilbert Hospital

Added Old QD Library US AGENCY FOR INTERNAT'L DEVELOP.   Old Code: AID
    To a Made-Up DOCUSER Value.  New Value: DCUAID; Us Agency For Internat'l Develop.

Added Old QD Library AMERICAN MEDICAL ASSOCIATION   Old Code: AMA
    To Closest DOCUSER Match: ILUAMA; American Medical Association

Added Old QD Library AMESBURY HOSPITAL/ATTN: ADMINISTRA   Old Code: AME
    To a Made-Up DOCUSER Value.  New Value: XXXAME; Amesbury Hospital/Attn: Administra

Added Old QD Library COLLEGE OF PHYSICIANS AND SURGEONS   Old Code: BCP
     To New DOCUSER Record: BCCBCP; College Of Physicians And Surgeons Of British Colu

Added Old QD Library CORNELL UNIV MED COLLEGE/SAMUEL WO   Old Code: BYC
     To New DOCUSER Record: NYUCOR; Weill Medical College of Cornell University
```

In the report above:

2. The **first item** reports what is no doubt a **correct transfer**. The old code was ACY and the new is NYUACY. The old Institution name (in CAPS on the first line) matches the new name as retrieved from the DOCUSER file.

2. The **second item** shows a case where the code in old QD doesn't match that found in the new, but there's a **close enough match** to suggest the correct entry, so the new record MAUAGG is assigned.

3. The **third item** wasn't found in DOCUSER, so a **new LIBID is invented**, using the State/Province captured from old QD. No other DCUAID exists, so that value is assigned.

4. The **fourth item** found a **likely match** for AMA.

5. The **fifth** was for a Library in old QD with **no address information**. Since we can't tell which state or province this library is in, and we don't have an old LIBID (in the 12345A format---it's probably one of those 00000A Libraries), the only place to go is **XXX plus the old code**.

7. The **sixth** found the correct Canadian library (the old record no doubt had the correct old LIBID).

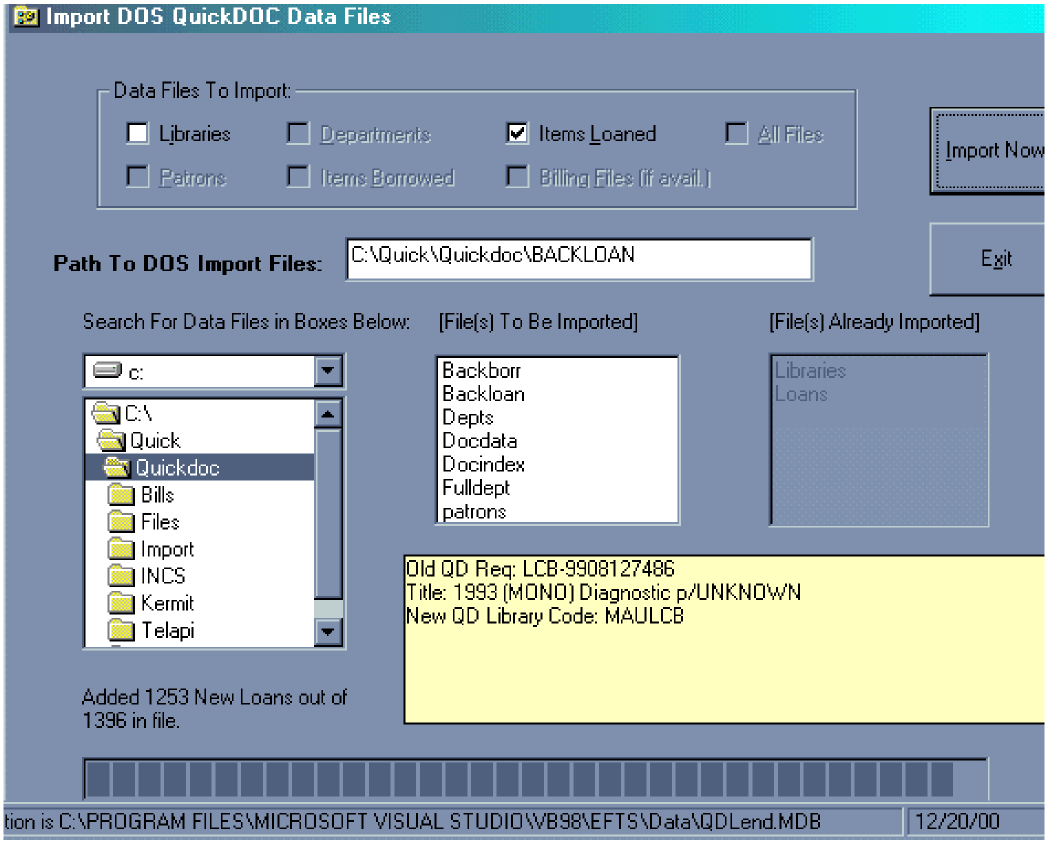
Finally, the **last item** might suggest a check. The old Cornell was filed under BYC, but it had a real LIBID (10021A), which was successfully looked up in the new DOCUSER file. This produced the hit on new LIBID NYUCOR. But the two names are sufficiently different that it might be wise to double-check before accepting this choice uncritically, just in case the old LIBID was entered incorrectly (although I think that this one was okay, but haven't had time to check!).

Import Loans

Import Items Loaned uses a similar approach to import Libraries. Check the **Items Loaned box** and click "**Import Now**" to begin.

[One hint re: **Reducing the number of items to be imported from old QD**. If you don't want to get ALL the items in your old QD BACKLOAN file, use the Date box to restrict the dates imported to some later date. The default will be January 1, 2000, but you can change it as necessary. This will speed up the import process.]

Progress of the import shows in both the yellow comment box and on the Progress Bar at the bottom of the screen:



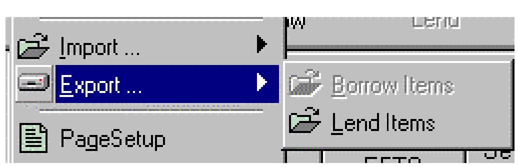
In the case above, the last record imported was a Monograph; 1253 items have been imported (out of 1396 in the file); and the Libraries and Loans have been imported previously (in most cases you'll only import Loans once, unless you have archived files from old QD you want to add.

```
Wednesday, December 20, 2000          Report of Loans Imported From Old QD - MAUBET

More than one match was found while searching ISSN for NATURE.
   Chosen Title: Nature.   ISSN: 0028-0836

Could not find Library for old Request Number LOW-9711204187 in file.
   Filed instead with Orphan Borrower XXXNOT.
```

The **report of Loans Imported from Old QD** captures 2 situations: 1., if there was more than one match on a journal title, it lets you know, and 2., if it can't find an old Borrower in the new file it assigns it to a default value of **XXXNOT**. You can reassign these later, after creating the Borrower record.

Export Files

The **Export** choice is found on the **File Menu**. It will not be enabled unless you have populated the Grid with a number of records. The records contained in the set meeting your search criteria will be the set exported.



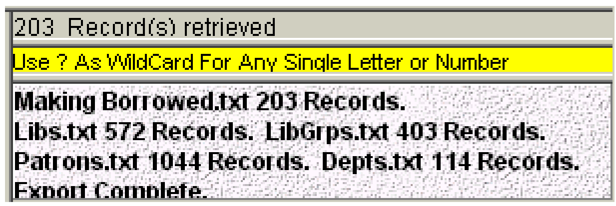
Fill Grid with Items to be Exported

Searching the required date range using the **Status value Equals All Acted Upon** retrieves **all requests** that were processed during that period and, consequently, is the most inclusive set. Use this with the **Search All Lend Items Grid**, for example, to get all Lend records for Export.

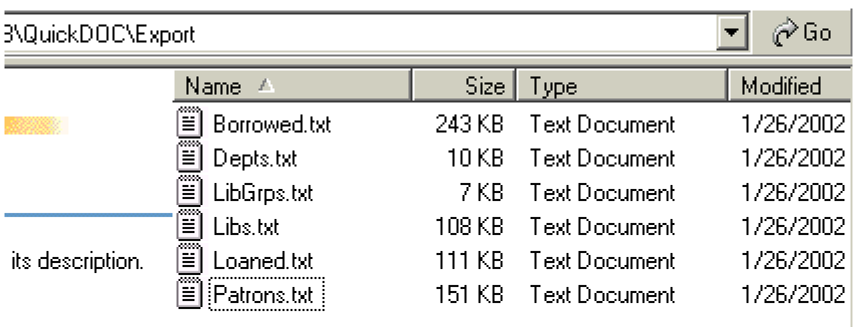
Once the Grid is populated, click the **File Menu**, **Export** and **Lend Items**, as shown above to effect the Export. The export process will transfer only those items you've chosen to a text file named after the database table, in this case **Loaned.txt**, or **Borrowed.txt**, for Borrows, always located in a folder called \Export just beneath your database location.

Just to be safe, it will also export to text files your current Libraries, Library Groups and, for Borrowed Items, the Patrons and Dept Tables. Three **comma-delimited text files** (Loaned.txt, **Libs.txt**, and **LibGrps.txt**)are created for Loaned items; five comma-delimited files (Borrowed.txt, Libs.txt, LibGrps.txt, **Patrons.txt**, and **Depts.txt**) are created for Borrows.

When the export is complete (it doesn't take very long) you'll get a message to that effect, something like:

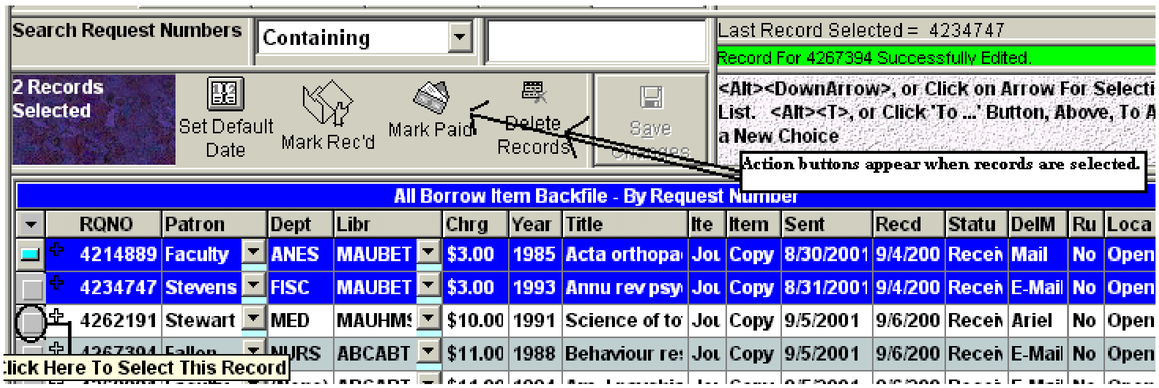


You'll find the files in the \Export folder, located centrally just beneath your QuickDOC.MDB database location, ready to be imported into an Access 97 database, a version of Excel, or most any other database application that can accept input from external files.



Export Selected Records

You can export a **subset** of whatever records are in the Grid by Selecting that subset (either by holding down the **Ctrl key** and clicking the **Record Selector** of each record to be included, one by one, or by selecting the top record and then holding down the **Shift key** and clicking the last record in that group, if it's a **group of contiguous records**. If there are **records selected**, only these will be exported.



Selected records appear in blue.

Export Filenames

Depending upon the Grid you are exporting from, the following filenames will appear in the **Export Folder beneath the QuickDOC.MDB Database location**:

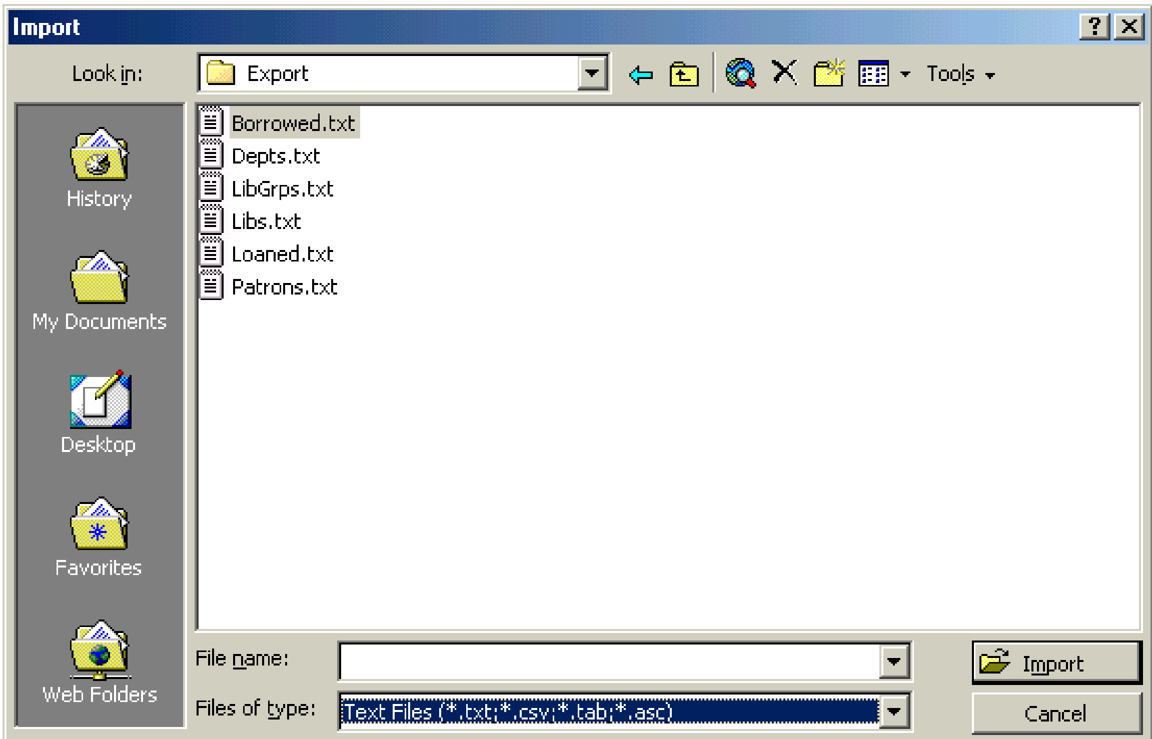
Grid	Export FileNames	Description
Lend Item Backfile	**Loaned.txt**	Individual items
	Libs.txt	Libraries
	LibGrps.txt	Library Groups
Library Billing	**LibBills.txt**	Individual items
	Libs.txt	Libraries
	LibGrps.txt	Library Groups
Borrow Item Backfile	**Borrowed.txt**	Individual items
	Libs.txt	Libraries
	LibGrps.txt	Library Groups
	Patrons.txt	Patrons
	Depts.txt	Departments
Local Billing	**LBilling.txt**	Individual items on Local Billing Grid
	Libs.txt	Libraries
	LibGrps.txt	Library Groups
	Patrons.txt	Patrons
	Depts.txt	Departments

Local Billing column headers exported won't include the full Field Name (e.g., BorrLocalRQNO) but will strip out the prefix and include just the descriptive part (e.g., RQNO).

How To Import Exported Data Files

Steps to **import previously exported files** are as follows (using an **Access database import example** here, but the steps will be similar with any other database or spreadsheet format):

1. Start up Access and choose a Blank Access Database (the first time; once you've got the Access 97 database created, you can import subsequent exports into the same database). Create this database in whatever folder you wish.
2. Choose Menu choice **File**, then **Get External Data**, then **Import**.
3. Navigate to your \Export folder and choose Files of **Type "Text Files"** to see the new exported file list.
4. Select "LendItem.txt" and click **Import** to generate the Import Text Wizard.



<u>Import Text Wizard Screens</u>

1. **Delimited** should be checked, click **Next** to move to the next screen.
2. **Delimited 'comma'** should be checked; **Text Qualifier = Double Quote**; also check "**First Row contains Field Names**" box; then either click the Advanced Button or otherwise edit fields as follows (this example is for Loaned.txt and LibBills.txt, but Borrowed will be similar, with “Borrow” preceding the field name---LBilling.txt has the “BorrLocal” preceding the field name stripped out, and will look much like those cited below):

RQNO	- Change "Indexed" to "**Yes (No Duplicates)"**
CHRG	- Change "Data Type" to **Currency** (if a currency type is available)
EFTS	- Change "Data Type" to **Yes/No**
DTRE	- Change "Data Type" to **Date/Time**
DTFL	- Change "Data Type" to **Date/Time**
DTPD	- Change "Data Type" to **Date/Time**
MaxCost	- Change "Data Type" to **Currency**
RushRequest	- Change "Data Type" to **Yes/No**

Click **OK**, then click **Next**

3. Choose to store data "**in a new Table**" for the first import, or choose the matching table for subsequent imports.
4. Configure Fields, if they haven't already been configured with the Advanced Button above; otherwise, click **Next**.
5. "**Choose my own Primary Key**," which should be the **RQNO** field in all cases, then **Next**.
6. Finish.

Repeat for Libs.txt, LibGrps.txt, etc. The **import wizards** generally guess fairly well at the **Data Types needed for the new import database**, with the exception of types listed above. You can accept the text data type for most fields, but make sure any Date/Time, Currency or Boolean fields are set up properly. **Primary keys** for each of these Tables are:

Libs	**-**	**LibID**	(LibUseISO and LibEFTS are Yes/No)
Patrons	**-**	**PatronID**	(PatronActive is Yes/No)
Depts	**-**	**DeptAbbr**	(All text except for PrefPmt and AddrID)
LibsGrps	**-**	**Both fields**	(All Text)

Importing To Excel

Importing records into Excel-type spreadsheets works in similar fashion to the Access example, above, except that you are importing each table into an Excel worksheet. You may be able to get by with importing just the Loaned.txt and Borrowed.txt files, if you just need basic information. Or you can also import other .txt files into separate sheets, and then link them by Primary Key values. The LibGrps.txt file export looks like this:

[The first row is a list of the field names.]

"GroupLibrary","GroupName"

[All the other rows contain the data for those fields, one per record]

"MAUNEP","MA"

"MAUNHM","R8"

"MAUNLF","MA"

"MAUNLF","BBLFAX"

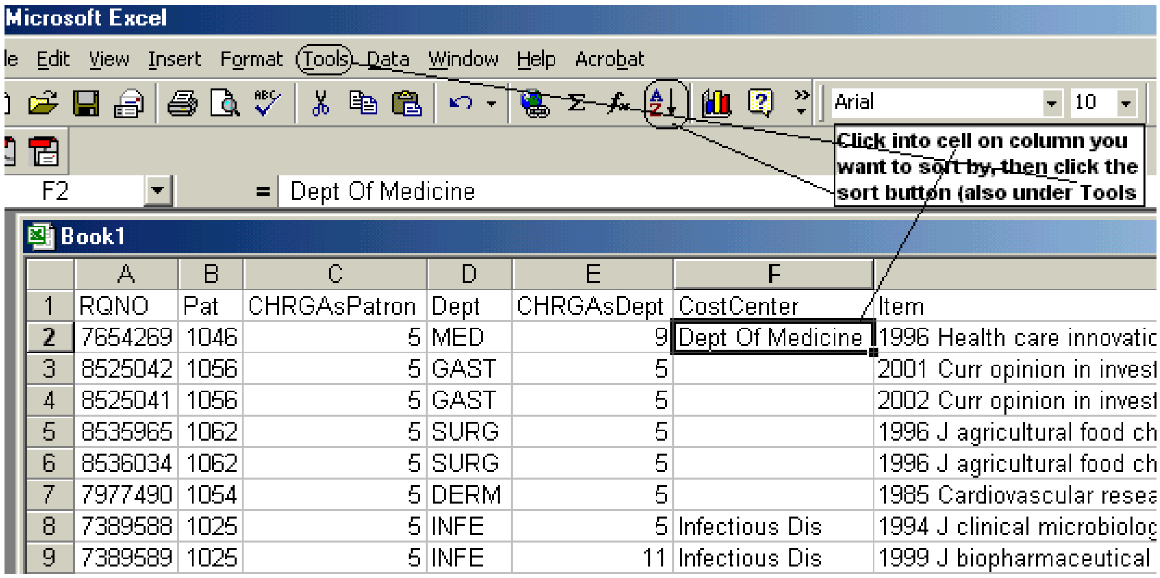
etc.

The GroupLibrary field matches the BORR field in the LendItems Table (and LibID field in tblLibs, or BorrowLibr in tblBorrowItems), so that you can create some kind of Lookup relationship between the two sheets that will reference the related data in the LibGroups worksheet to the LendItems worksheet (although this case is a bit more complicated, because each Library can belong to any number of Groups). Rather than trying to match the exact Library to exact LendItems, BTW, export always dumps out the entire Libs Table (it exports ONLY the LendItems or Borrow Items you select), just to make sure that the Library record is always available, should you need it. The same is true for Patrons.txt, Depts.txt and LibGrps.txt.

Sorting the Excel File

Typically the imported set of records comes in sorted by whatever sorting was used when the data was retrieved from the database (even if you changed the sort order in the QuickDOC Grid).

Once the data is in Excel, though, you can assign a new sort order, based on one of the columns, as follows:



1. Click into any cell in the column you wish to sort by;
2. Click the Sort Ascending (or Sort Descending) button, which is under the tools menu if not currently displayed on your tool bar.
3. Export or print the file, as desired.
4. Click into another column to prepare a different view of the same data.

Uninstalling QuickDOC

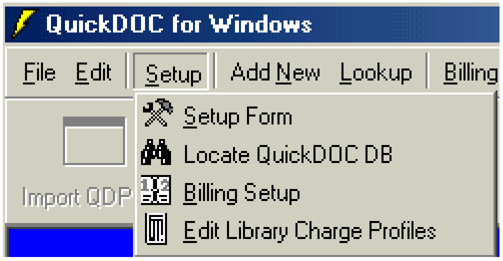
Uninstall QuickDOC

If you ever need to **uninstall QuickDOC**, you can do so in the Control Panel - Add/Remove Programs, and any system files updated in the installation will be returned to their older versions (it won't delete any database files, though, just in case).

QuickDOC Database

QuickDOC Database Location

1. In general, **if you think that more than one computer will be using the files, it's best to locate the data files on a network drive**. Make sure that all potential users have all rights, including Create, Delete and Modify Files, Folders and subdirectories in the folder you choose.
2. If **only this machine will be running QuickDOC**, the database will be located, by default, in same folder where the QuickDOC.exe file is located. You can always change the location later using the **Locate QuickDOC DB choice under Setup** on the QuickDOC Menu Bar.



3. The Locate QuickDOC DB choice leads to the **QuickDOC.MDB Database Operations Form**, which is used to move the QuickDOC.MDB database, as well as to identify the location on first installation (see below).

In general, locating the database on a server seems to have the most advantages.

Current QuickDOC Database Location

The **current database location** of the database will be available in two places:

On the Status Bar

The QuickDOC **Database Location** is always visible in the **Status Bar** that appears at the bottom of the screen.

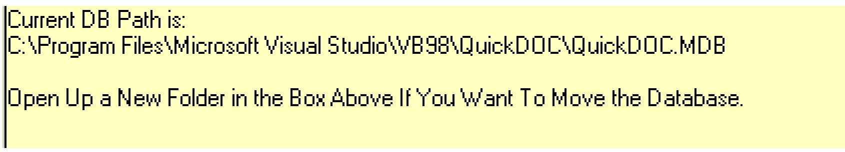
If you can't see the Status Bar at the bottom of the screen, it's probably hidden behind the Windows **Task Bar**. If you'd like to have both the Windows Task Bar and the QuickDOC Status Bar visible, you can make the Status Bar visible by re-sizing the QuickDOC Main Screen**.** First diminish the Windows Task Bar temporarily by dragging it down to the bottoe on the screen. Move the MousePointer to the top of the Windows Task Bar, until it turns into an Up and Down Arrow:

Then drag that top line down to the bottom of the screen until the Task Bar disappears, to expose the Status Bar of QuickDOC. Use the lower right corner of the QuickDOC screen to drag it up just enough to permit the Task Bar to take up the space beneath:

Once the bottom of the QuickDOC Status Bar has been raised enough to match the bottom space that the Windows Task Bar usually takes, stop dragging the bottom of the QuickDOC form. Move the MousePointer to the very bottom of the screen, until it turns into that familiar Up and Down Arrow, and then move it up to the bottom of the new QuickDOC form and let go. Repeat until both the Status Bar and Windows Task Bar are visible onscreen. Once this is set, it should become the default for future sessions.

On the Locate QuickDOC DB Form

It's also available in the yellow box at the middle of the Locate QuickDOC DB form as the current location, in case the Status Bar isn't available. Click **Setup** on the Menu Bar, then Locate QuickDOC DB:



Just click Exit when you're finished.

QuickDOC Database Troubleshooting

Problem Opening Version Table

When you see **Problem Opening Version Table** as QuickDOC starts up, in most cases it means that the database isn't being found where the program thinks it should be (it can also occur if someone has locked down the database for some maintenance operation, but this will rarely be the case, and if it happens just after downloading an update, then it's probably a location problem).

Each machine running QuickDOC keeps track of where the database is located by checking a Registry entry. If it doesn't find the db there, it next looks in the program folder (typically, C:\Program Files\QuickDOC) to see if it's there.

If it finds one there, it will go ahead and use that one, but if not, you'll get that Problem Opening Version Table error. In general, this could occur if the database was moved outside of QuickDOC (rather than with the "Locate QuickDOC DB" form) and consequently the Registry entry no longer pointed to the correct location.

Try this as a way to recover. First, use Windows Explorer (or NT Explorer) to check whether the QuickDOC.MDB database file is in the folder you expect it to be in (the recommendation is either the QuickDOC Program folder, if you're using only one machine or some file server location if you're using more than one). If it is, and if the size of the file is greater than 4660K or so and it was recently accessed, then it's probably the one.

If you want to look and see where the **Database Registry Entry** thinks the db is, do this:

1. Click the Start Button, then "Run."
2. Type: **regedit** in the run box and click OK.
3. When the **Registry Editor** comes up, click the + sign next to the following:

    HKEY_CURRENT_USER, then

    Software, then

VB and VBA Programs, then

QuickDOC

4. Under QuickDOC, you'll see a **Database Key** folder; click once and its values will show up in the right pane. The path next to "**Location**" is where the program THINKS the db is.
5. Make a note of this path and close the Registry Editor (**DON'T** try to make any changes with the Editor!) either by clicking the x on the upper right or clicking "Registry," then Exit.

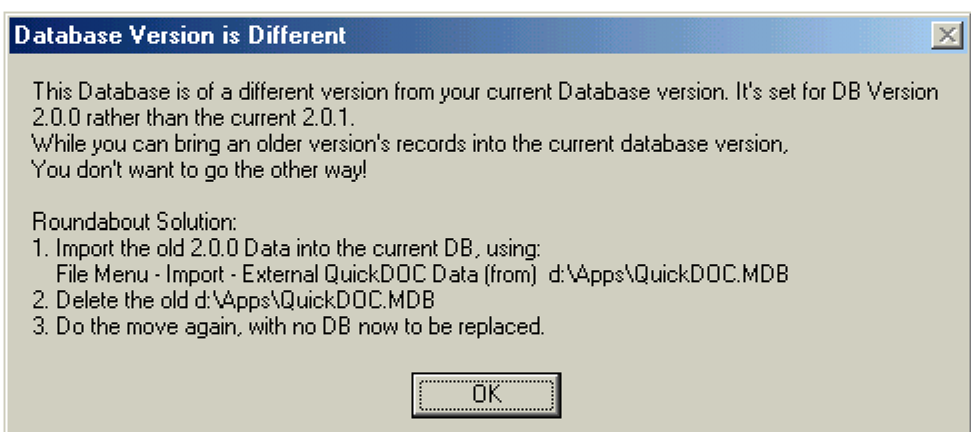
Next look in your Program folder (C:\Program Files\QuickDOC is the default) to see if there's a default QuickDOC.MDB file in there. If there isn't, you can rename the QDUpd.MDB file to QuickDOC.MDB and try to start up again. If this works, then skip to **Locate the DB Again**, below.

If there's already a QuickDOC.MDB in the Program folder and you're still getting the error, then your best bet will be to delete the Database key so that QuickDOC sets up the location anew. Follow all steps in the list two paragraphs above until number 4. In number 4, where you first see the Database folder under the QuickDOC key, right-click on the folder icon and choose **Delete this Key**. Once the key is deleted, choose Registry from the menu bar, then Exit.

When next you start up QuickDOC, it should announce that you'll need to identify the Database location, etc. If you're not brought directly to the "Database Operations" window, then use the Setup Menu to **Locate QuickDOC DB** in its proper place.

Database Version is Different

When performing an installation on a new machine with an updated version that is **greater than the current Database Version**, and if, for whatever reason, you don't get a chance to point to the correct database at the time of installation, you'll get a message box with the following warning when you try to move it to the desired location:



If this occurs, follow the instructions above, which will, in effect, first move the data from the database with the earlier version notation to the current (generally minimal) installation database, and then clear a space on the server where you can move it (newly updated) back to where it was.

Steps are:

1. Use the File Menu, Import choice to choose External QuickDOC Data, and click on the folder with the old version database.

2. When you've found it, click **Import Now**. This moves the old data to the new database format.

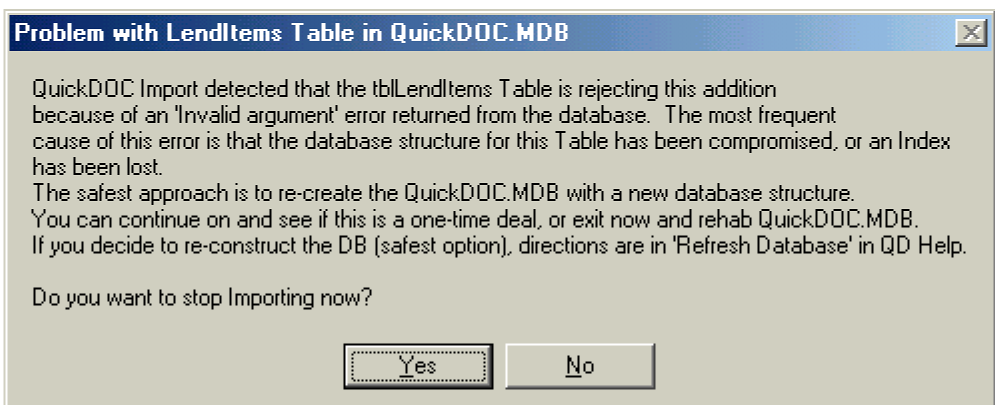
3. Use Windows Explorer to delete (or rename, just to be safe) the old QuickDOC.MDB.

5. Use the Setup Menu, Locate QuickDOC DB, to move the database location once again to the desired central location. Since there won't now be a file to update, this operation will be very quick and the database should now show in the Status Bar in the new location.

This situation can be prevented by using this strategy: **First update all computers currently running QuickDOC before installing any newer version on a new computer**.

Refresh Database

If, during the course of adding a Borrow or Lend Item record (usually during a QDPortal Import), you encounter a Message Box with a reference to an **Invalid argument** or **rehab QuickDOC.MDB**, it's rather likely that the database table in question has been **corrupted** and we may need to use a fresh database structure and move the data from the corrupted database into the new and uncorrupted database structure. A typical announcement of this kind will appear as follows:



You can try one or two more times, to see if it's a one-record glitch, but if this message persists you have three choices (MS Access Database Repair usually won't work on this problem):

1. Try running the **JetComp**.exe utility (see **Compact & Repair Database**, below). JetComp sometimes works where the Access 2000 Database Repair utility doesn't.

2. Try using your latest backup version of QuickDOC.MDB (but this may just replicate the problem.

3. Begin with a fresh, new database structure and re-import just the data from the old database.

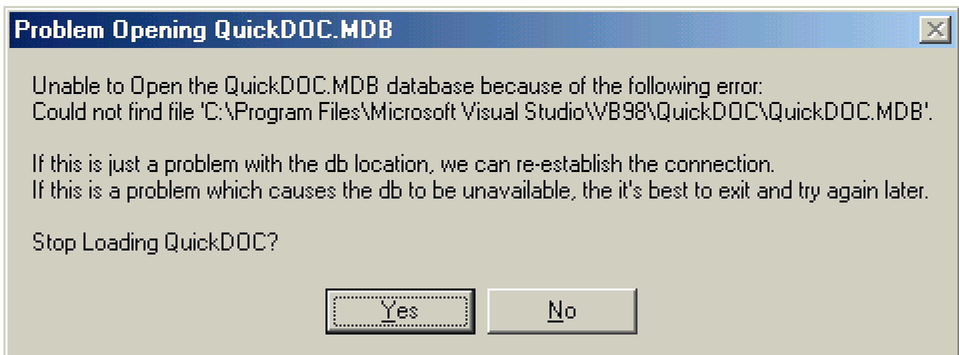
The latter of these may take a bit of time with a large database, and is probably best set to run overnight, so that the new database will be ready in the morning (this is recommended for databases with more than 10,000 items in both Lend and Borrow), but the result will be a fresh database structure with all the current data restored.

Steps are:

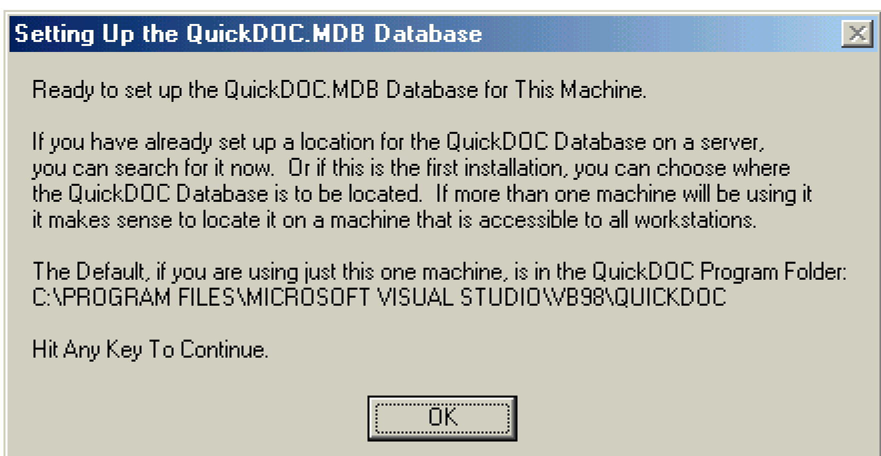
1. **Make sure all users are logged out of the QuickDOC and that no one will be logging in to the database during this procedure**.

2. Use Windows Explorer to move the (current, corrupted) QuickDOC.MDB database to another location (somewhere you can easily find it again, for importing purposes). This will mean that there will now be no QuickDOC.MDB where the program expects to find it.

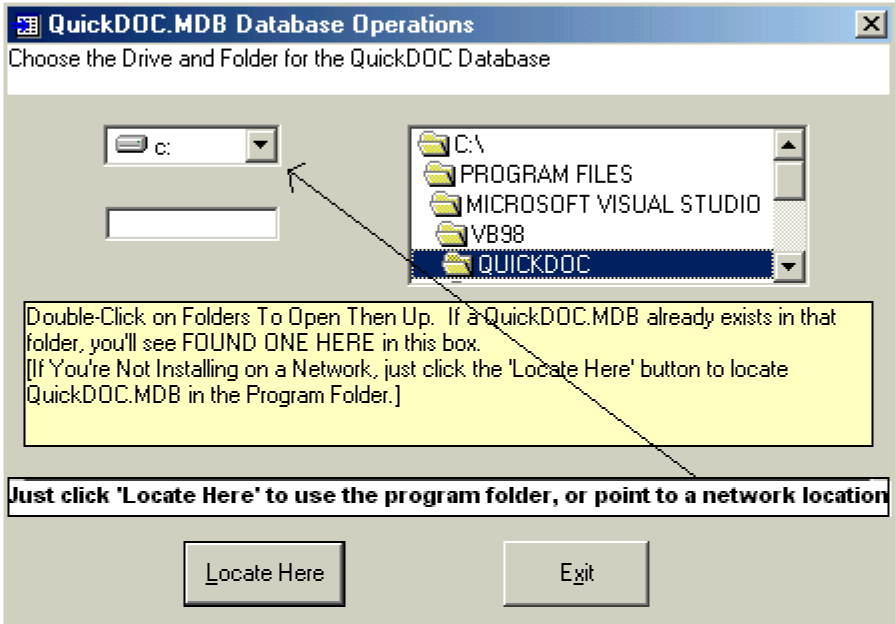
3. Start up QuickDOC on your fastest machine ; you'll get the error message that the database can't be found.



4. Click [No] so that the program continues to load. This will cause it to prepare the default database (with the uncorrupted structure) for use as the main QuickDOC.MDB. You'll see the message announcing that we're ready to create the new database:



5. Click Ok and then use the QuickDOC.MDB Database Operations form to locate the database in the same folder where you have just recently removed the corrupted QuickDOC.MDB.



6. When you find the proper folder, click **Locate Here** to place the new database (mostly empty) in that location.

7. You may have to fill in some entries in the Setup Form, but once that's finished, use the **File Menu**, **Import** choice to choose **External QuickDOC Data**, and navigate to the folder with the old (corrupted) database, just moved there in step two, above.

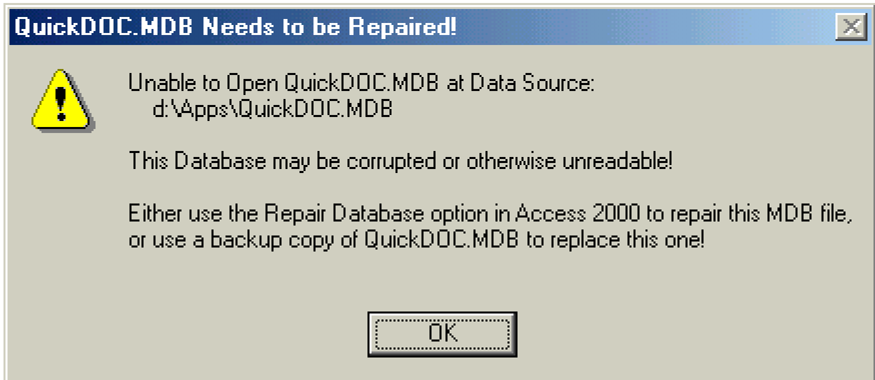
8. When you've found it, click **Import Now**. This moves the data only, from each table, to the new database structure, table-by-table, record-by-record**. Since this is a very intensive use of the database, it's a good idea NOT to do any other database work at the same time**. It can take anywhere from thirty minutes (for a small database, with a few thousand records) to 6-8 hours for a database with tens of thousands. Because this process imports and verifies each record passed from the old database, it will take time to run through.

9. After the import process is complete, either run the **Access 2000 Compact & Repair** function to complete the process, or use the **JetComp.exe** program (found in the QuickDOC Program folder) if you don't have a copy of Access 2000. See Compact & Repair Database, below.

QuickDOC.MDB Needs to be Repaired!

When you see a message box with the heading **Unable to Open QuickDOC.MDB at Data Source** as QuickDOC starts up, or at any other time, it COULD be a missing database, but, more likely, it will be a **corrupted** or otherwise **unreadable** database and this database needs to be **repaired**.

If you get this message:



it isn't good news. You can either **Repair** the database or **Restore** the database from an earlier backup. If you have a backup of QuickDOC.MDB that is the same or very close to the same as the current DB, then go ahead and restore that one to replace this one; repair if you can.

Restore QuickDOC.MDB

If you have a backup of QuickDOC.MDB, and haven't added anything yet today to the DB, then absolutely go with the Backup DB!

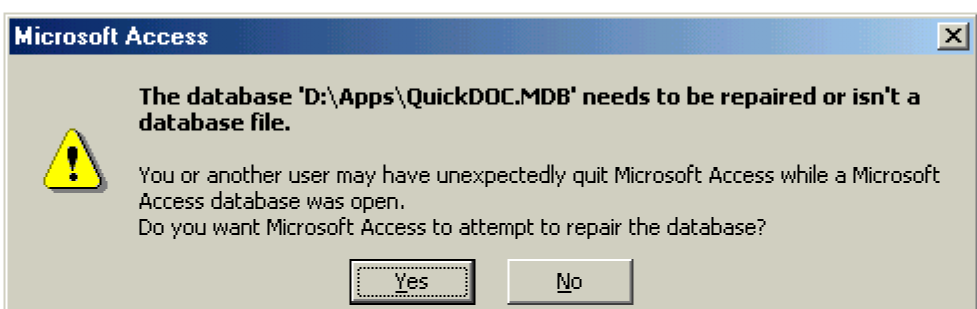
If you have no backup of QuickDOC.MDB then you will need something else. If you have Access 2000 on this machine (or another nearby) you can use that program to repair the database. Otherwise, we're back to Total Reconstruction of the database (Not something we look forward to).

Repair QuickDOC.MDB Database

Try running the **JetComp**.exe utility (see **Compact & Repair Database**, below). JetComp sometimes works where the Access 2000 Database Repair utility doesn't.

While using the JetComp.exe utility is the better choice in most cases, if you have Access 2000 (or greater), you can also repair the database **from within Access 2000**. First make sure that everyone has logged off of QuickDOC.MDB (while Access 2000 can effect changes to this database, it isn't reliable in a multi-user environment; so have everyone sign off first). Then open the QuickDOC.MDB database by double-clicking on it from Windows (or NT) Explorer:

When you first try to open QuickDOC.MDB (with Access 2000) you'll get the following Error Message:



Click **Yes** to attempt the repair. In most cases this will be successful.

Using Access 2000 with the QuickDOC.MDB Database

This is also important for regular QuickDOC.MDB use: if you access the database through QuickDOC, then the database is protected by the ADO-mediated database management, with record-locking and other database protections involked. Opening the database using Access 2000 doesn't have these protections---it just opens the DB, for whatever changes you have in mind, but without the kind of protections you'll have when using this same database in QuickDOC.

So, please, keep these two things in mind:

1. **If you're opening QuickDOC.MDB in Access 2000, try to insure that no one else is, or will be, logged in.**
2. **When doing updates from one QuickDOC version to another, do one workstation at a time, since some updates will involve database updates, which may be extensive, and having more than one database attachment trying to make these changes at the same time just increases the chance for collisions**.

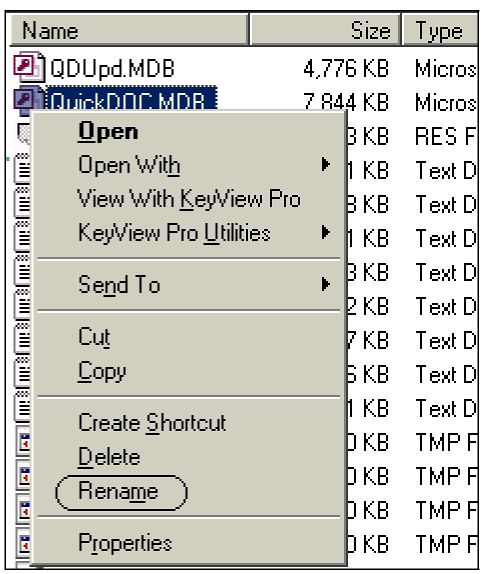
Compact & Repair Database

JetComp.exe

It's definitely a good idea to run the JetComp.exe program periodically, whether or not your database appears flaky, to compact and refresh the data in QuickDOC.MDB. Jetcomp.exe is a standalone utility that allows you to compact the database from outside the QuickDOC program. **Make sure all users have logged out of the system**.

1. Open Windows Explorer and navigate to the **QuickDOC Database location** (it's always shown with the full path in the Status Bar at the bottom of the Blue Screen).

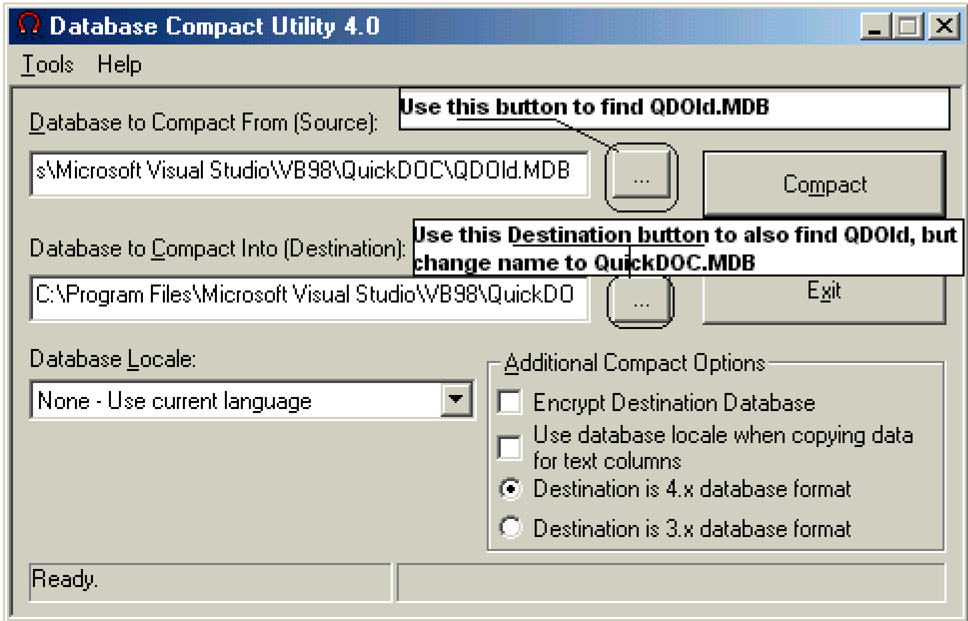
2. Right-click on the QuickDOC.MDB icon (you may see it a a Key symbol or MDB file) and choose **Rename**. Change the name from **QuickDOC.MDB** to **QDOld.MDB**.



3. Again, using Windows Explorer, navigate back to the QuickDOC Program folder (usually C:\Program Files\QuickDOC).

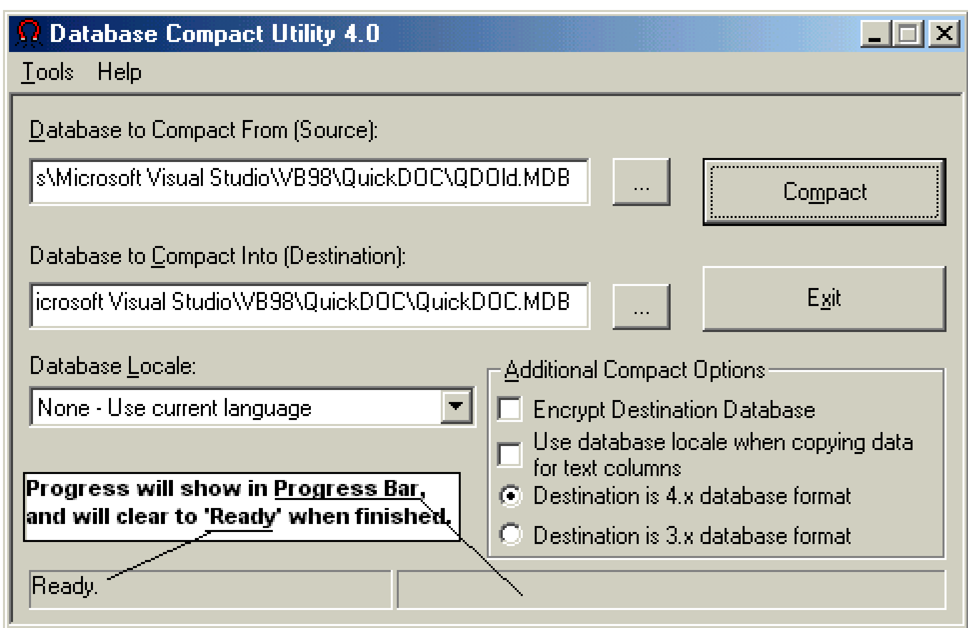
4. Double-click JetComp.exe

5. In the **Database to Compact From (Source)** box, use the […] button to navigate over the the QDOld.MDB file. This is the database that you want to compact.



6. In the **Database to Compact Into (Destination)** box, use the […] button to navigate over the the QDOld.MDB file once again. This time, change the QDOld.MDB at the end to QuickDOC.MDB (use the preferred capitalization for consistency).

7. Click **Compact.** You'll see a Progress Bar on the lower right, and the status will return to Ready when it's finished.



QuickDOC Database Backup

All the data now resides in the QuickDOC.MDB database, which begins at about 4.6MB in size and can increase into the 15-20MB range quickly enough if you have a lot of activity. One of the reasons I usually advise putting the QuickDOC.MDB file on a server is that a **server backup** is usually scheduled regularly.

An additional strategy is to also do a **local backup** at the end of each day, after all users have logged off, by executing a batch file that copies QuickDOC.MDB from its server location to a specified spot on the local C: Drive. It's just a one-line command to: copy [serverlocation]\QuickDOC.MDB C:\[locallocation].

QuickDOC also keeps backups of the raw ASCII text downloads in two \BackImp folders just beneath the C:\QDBorrow and C:\QDLoan folders on any machine running both QDPortal and QuickDOC. The backups are tagged with the year they were imported as the first four digits, so you could decide to back up only the current year's imports.

But **backing up the backups of imports** may be more than you think necessary. Backing up the database should suffice, expecially if you have both the typical nightly server backup and a local backup of your own on the C: drive of your machine.

I'll try to work in an automated version of this latter backup process at some point.

BorrowItems Table in QuickDOC.MDB

The primary Table for Borrow information is **tblBorrowItems**. This table contains the following fields:

BorrowRQNO

This is the Request Number field, and is the primary key for this table. It shows up on Grids as the **RQNO column**. It's a text field, with 14 characters available.

BorrowPatronRec

This is the Patron number associated with the record; it identifies the actual Patron involved, and appears at the top left of the first Tab on the Edit Patron form, and in brackets in the Patron field on DOCLINE. As the primary key of the Patrons Table (**tblPatrons**), it will be unique for each patron. It shows up on Grids as the **Patron column**, but is usually translated into it's Name format. It's a number field and is assigned by the program only.

BorrowPatron

This is a text version of the Patron number field, retrieved from the Patron record and displayed in the format Last, First. It's a way to easily display a recognizable Patron without another trip to the database to look it up by number. It is normally hidden on Grids, just to the right of the Patron column, but can be exposed by dragging vertical line in the header of the Patron column to the right, or by clicking **Show All Grid Cols** from the Column Context Menu, and will then appear as the **Name column**. It's a text field with 50 characters available.

BorrowDept

This is the abbreviated form of the Department record and is the primary key of the Departments Table (**tblDepts**), so it will be a unique identifier of the Department. It shows up on Grids as the **Dept column**. It's a text field with 16 characters available.

BorrowLibr

This is the General Code of the Library record. It should be the same as the NLM LIBID if an NLM LIBID is available. It is also the primary key of the Libraries Table (**tblLibs**), so it will be a unique identifier of the Library. It shows up on Grids as the **Libr column**.   It's a text field with 6 characters available.

BorrowCHRG

This is Charge that the Lending Library will apply for the type of request and delivery method requested. It's generally derived from the Library Charge Profile assigned to that library. It shows up on Grids as the **Chrg column**.   It's a Currency field and only accepts numbers.

BorrowYear

This is the year of publication for the item. It shows up on Grids as the **Year column**.   It's a text field with 4 characters available.

BorrowTitle

This is the Journal Title or monograph title for the item. It's retrieved from the Journals Table (**tblJrnls**) through the unique Journal Identifier (JID), which is also kept in the next field. It provides a way to show the Journal Title without another trip to the database.   It shows up on Grids as the **Title column**.   It's a text field with 100 characters available.

BorrowJID

This is the Journal number associated with this item; it identifies the actual Journal (there are default JIDs for Monographs and Audio-Visuals), and appears at the top left of the first Tab on the Edit Journal form. As the primary key of the Journals Table (**tblJrnls**), it will be unique for each title. It is normally hidden on Grids, just to the right of the Title column, but can be exposed by dragging vertical line in the header of the Title column to the right, or by clicking **Show All Grid Cols** from the Column Context Menu, and will then appear as the **JrnlID column**.   It's a number field and is assigned by the program only.

BorrowItemType

This is the type of item requested. It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms.

Code	Displayed As
J	**Journal**
M	**Monograph**
A	**Audio-Visual**
E	Ejournal (not yet implemented)

It shows up on Grids as the **ItemType column**.   It's a text field with 1 character available.

BorrowItemForm

This is the form of item requested. It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms.

Code	Displayed As

C	**Copy**
O	**Original**

It shows up on Grids as the **ItemForm column**. It's a text field with 1 character available.

BorrowDTSE

This is the Date Sent field. It shows up on Grids as the **Sent column**. It's a Date/Time field.

BorrowDTRE

This is the Date Received field. It shows up on Grids as the **Recd column**. It's a Date/Time field.

BorrowDTPD

This is the Date Paid field, referring to payments to the Lending Library (rather than in-house payments from Depts or Patrons). It shows up on Grids as the **Paid column**. It's a Date/Time field.

BorrowStatus

This is the current status of the request. It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms.

Code	Displayed As
Q	**Queue** (a Loansome Doc just imported)
O	**Outstanding** (not yet rec'd)
N	**Not Filled**
R	**Received**
I	**PaidIFM**
P	**PaidLender**
E	**PaidEFTS**

It shows up on Grids as the **Status column**. It's a text field with 1 character available.

BorrowDelMeth

This is the Delivery Method requested (or used, once the request is received). It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms.

Code	Displayed As
M	**Mail**
A	**Ariel**
E	**E-mail** (both **PDF** & **TIFF**)
F	**Fax**
K	**PickUp**
W	**Web** (both **PDF** & **TIFF**)

It shows up on Grids as the **DelMeth column**. It's a text field with 1 character available.

BorrowRushRequest

This field indicates whether the current request is a Rush request or not. It displays as Yes or No. It shows up on Grids as the **Rush column**. It's a boolean Yes/No field.

BorrowMaxCost

This is MAX COST amount that is sent along with the request. It shows up on Grids as the **MaxCost column**. It's a Currency field and only accepts numbers.

BorrowLocalStatus

This is the current internal status of the request. It reflects the Local Billing status when items are billed internally to Patrons or Departments. It will be the same in **tblBorrowItems** (revealed through the Borrow Grids) and in **tblBorrLocals** (revealed through the Local Billing Grid) for each item. It's stored in full, rather than as a single letter, in the database field. Legal values are:

Value	Description
Open	Not billed.
InvDep	Invoiced to Department
InvPat	Invoiced to Patron
PaidDp	Paid by Department
PaidPt	Paid by Patron

It shows up on Grids as the **LocalStatus column**. It's a text field with 6 characters available.

BorrowSRCE

This reflects the Source (or bibliographic utility) by which the request has been sent. It will be LOANSOME DOC for requests received via the NLM Loansome Doc process, whether the item is ultimately filled from the local collection or transferred to DOCLINE. It's stored in full, rather than as a single letter, in the database field. Legal values are:

Value	Description
DOCLINE	Requests entered into DOCLINE
LOANSOME DOC	Requests imported via Loansome Doc
OCLC	Requests entered into OCLC
RLIN	Requests entered into the RLIN system
Mail	Requests sent by Mail
Telephone	Requests made by telephone
Fax	Requests made by fax
Other	Some other locally defined method
Copy Service	Special category to track Copy Service.

It shows up on Grids as the **SRCE column**. It's a text field with 20 characters available.

BorrowNote

This field contains various notes about the current item. In most cases it will contain only the Payment Number for items marked as PaidLender, PaidIFM or PaidEFTS. This allows a lookup of payment information when focus is placed in the Status column and the **To Pmts button** is clicked, which shows the **Payments To Lenders Form** for deleting or adjusting a payment. It shows up on Grids as the **Note column**. It's a text field with 50 characters available.

BorrowExtended

This field is a numeric field and has been set aside for future use.

BorrBibs Table in QuickDOC.MDB

The **tblBorrBibs** table contain bibliographic and other information related to the item in tblBorrowItems by Request Number. Fields are:

BorrBibRQNO

This is the Request Number field, and is the primary key for this table. It associates this record with the record sharing this Request Number in both tblBorrowItems and tblBorrLocals. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field, with 14 characters available.

BorrBibCitation

This field contains Citation information. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 50 characters available.

BorrBibNoPages

This is the **number of pages in the article** as shown in the citation. QuickDOC calculates this at the time the request is saved, but in cases where it can't be calculated automatically or if the calculation is incorrect, it can be changed here. The Number of pages is usually required for Copyright Clearance Center reports, etc.. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a number field where only whole numbers should be entered.

BorrBibArticle

This is the title of the article borrowed. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 50 characters available.

BorrBibAuthor

This is the author of the article borrowed. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 50 characters available.

BorrBibCopyright

This is the **Copyright** Statement as supplied with the request. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 1 characters available. Values are:

Value	Description
G	Copyright Guidelines
L	Copyright Law

BorrBibRefReason

This is the **Referral Reason** sent along with the request, if any was stipulated. Referral Reasons used are those used by DOCLINE, although others may be supported in the future. The Referral Reason shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 3 characters available. Values are:

Value	Description
BDY	At bindery
CAN	Cancelled
LAC	Lacking
LOS	Lost
NOS	Not on shelf
NOT	Not owned (title)
NYR	Not yet received
ORD	On order
OTH	Other
UFR	(wrong) Format

BorrBibPMUI

This is the **PubMed UI** of the request, if any was included. This field may be used to flag duplicate requests, or to do re-sends of items not available for re-posting on DOCLINE. The PubMed UI shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 10 characters available.

BorrBibPurpose

This is the **Purpose for which the request is made**, which is typically the activity that is supported by this request, such as Patient Care, Education, etc. This information can be added in the Purpose field when entering items directly (in Add Borrow) but is normally not included in DOCLINE requests (there's no field for this in the main DOCLINE form online), although it can be added later by editing this field in the BorrBibs display. Legal values for this field are obtained from the **Purposes Table** (**tblPurposes**) in QuickDOC.MDB and only those values are allowed. The Purpose of each request appears under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name and is a text field with a 6 character maximum. It's stored in the database as a code (up to six letters), which abbreviates the full description found in tblPurposes. The Purposes Table initially holds a handful of values, and can be edited directly in Access 2000, but will be available for editing or adding on an edit form in the near future. Startup values in tblPurposes are:

ID	Full Name
EDU	Education
GRA	Grant-funded research
OTH	Other

PC	Patient Care
RES	Research

BorrLocals Table in QuickDOC.MDB

The **tblBorrLocals** table contains local Billing and also Due Dates and Returned Dates for returnable items borrowed. It's related to the primary request information in tblBorrowItems by the Request Number field. Fields are:

BorrLocalRQNO

This is the Request Number field, and is the primary key for this table. It associates this record with the record sharing this Request Number in both tblBorrowItems and tblBorrBibs. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field, with 14 characters available.

BorrLocalPat

This is the Patron number associated with the record; it identifies the actual Patron involved, and appears at the top left of the first Tab on the Edit Patron form, and in brackets in the Patron field on DOCLINE. It will be a match for the Patrons column on the Borrow Grid. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a number field and is assigned by the program only.

BorrLocalCHRGAsPatron

This is the Charge that is derived from the Patron/Dept Charge Profile assigned to this patron, and taking into consideration the type of request and delivery method requested. Basically, it cues up a Charge for this request in Local Billing when the Bills are assigned to the Patron. The final CHRG column is populated from either CHRGAsPatron or CHRGAsDept when the actual invoice is created or the item paid (it waits to see who's doing the paying). It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a Currency field and only accepts numbers.

BorrLocalDept

This is the abbreviated form of the Department record and is the primary key of the Departments Table (**tblDepts**), so it will be a unique identifier of the Department. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 16 characters available.

BorrLocalCHRGAsDept

This is the Charge that is derived from the Patron/Dept Charge Profile assigned to this patron, and taking into consideration the type of request and delivery method requested. Basically, it cues up a Charge for this request in Local Billing when the Bills are assigned to the Department. The final CHRG column is populated from either CHRGAsPatron or CHRGAsDept when the actual invoice is created or the item paid (it waits to see who's doing the paying). It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a Currency field and only accepts numbers.

BorrLocalCostCenter

This is the Local Cost Center assigned to be charged for this item. If the Patron has a Primary Cost Center, that will be automatically entered here. In any case, the dropdown box will be filled with any alternate Cost Centers associated with this Patron. It's a text field with 50 characters available.

BorrLocalItem

This is a display field that exists primarily to make printing Bills easier (no trip to the database to look up the item information that appears on the bill). It's populated at the time the request is created in the database from: Publication Year + the first 60 characters of the Title (from tblBorrowItems). Since it's used for printing Patron/Dept Bills, anything you enter here will appear in the same spot where the Year and Title information normally appear. After the first save, it's only updated if a Journal Change is made in tblBorrowItems, but keep that in mind. . It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 64 characters available.

BorrLocalDelMeth

This is the Delivery Method used to get the item to the Patron. By default, this value is the same as the BorrowDelMeth value, but can be changed to reflect a different internal Delivery Method. Since a Patron/Dept Charge Profile may appoint surcharges to different types of Local Delivery Methods, this value should be considered carefully. Legal values for this field are obtained from the **Local Delivery Methods Table** (**tblLocalDeliveryMethods**) in QuickDOC.MDB and only those values are allowed. It's stored in the database directly, in a **LocalDeliveryMethodName** field and is used to populate any Local Delivery Method dropdown combo boxes, as well as to calculate charges. The Local Delivery Method of each request appears under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name and is a text field with a 20 character maximum. The Local Delivery Methods Table initially holds a handful of values, and can be edited directly in Access 2000, but will be available for editing or adding on an edit form in the near future. Startup values in the tblLocalDeliveryMethods table are:

LocalDeliveryMethodName
Ariel
Email (pdf)
Email (tiff)
Fax
FedEx
Interoffice Mail
Mail
Messenger
Other
Pickup
Web (pdf)
Web (tiff)

BorrLocalRushRequest

This field indicates whether the current request is a Rush request or not. It displays as Yes or No. By default, this value is the same as the BorrowRushRequest value, but can be changed to reflect a different internal Rush structure. Since a Patron/Dept Charge Profile may appoint surcharges to a Rush Request, this value should be considered carefully. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a boolean Yes/No field.

BorrLocalCHRG

This is the final Charge that is applied from either CHRGAsPatron or CHRGAsDept when the Billing has been finally decided. It can be entered directly, but may be overwritten if a batch of Patron Invoices include this item (the same would be true if, instead, Dept Invoices are generated for a period in which this request has been received, and the CHRGAsDept value is different from the value entered in BorrLocalCHRG). The final BorrLocalCHRG column is populated from either CHRGAsPatron or CHRGAsDept when the actual invoice is created or the item paid (it waits to see who's doing the paying). It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a Currency field and only accepts numbers.

BorrLocalStatus

This is the current internal status of the request. It reflects the Local Billing status when items are billed internally to Patrons or Departments. It will be the same in **tblBorrowItems** (revealed through the Borrow Grids) and in **tblBorrLocals** (revealed through the Local Billing Grid) for each item. It's stored in full, rather than as a single letter, in the database field. It will be the same when displayed under the associated record display for BorrLocals (by clicking the + sign in the leftmost Grid column) as in the Main Borrow Grid. Legal values are:

Value	Description
Open	Not billed.
InvDep	Invoiced to Department
InvPat	Invoiced to Patron
PaidDp	Paid by Department
PaidPt	Paid by Patron

It shows up under associated record displays under its complete field name. It's a text field with 6 characters available.

BorrLocalDTRE

This is the Date Received field. It matches the BorrowDTRE value in tblBorrowItems. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a Date/Time field.

BorrLocalDTPD

This is the Date Paid field for internal Billing (Patrons or Departments) rather than external Billing (Libraries). It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a Date/Time field.

BorrLocalDTDU

This is the Date Due for Returnable Items. Since this isn't available automatically from DOCLINE, it must be entered directly in any Borrow Grid, using the BorrLocal associated record display. Entry of this date will permit alerts at some future time from within QuickDOC when items are due back. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a Date/Time field.

BorrLocalDTRT

This is the Returned Date for Returnable Items. Since this isn't available automatically from DOCLINE, it must be entered directly in any Borrow Grid, using the BorrLocal associated record display. Entry of this date will provide a lookup for Lending Library queries about items they haven't yet recorded as returned. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a Date/Time field.

BorrLocalInvoice

This field contains Invoice Numbers and Payment Information for Local Billing of this item. This allows a lookup of local payment information when focus is placed in the Status column and the **To Pmts button** is clicked, which shows the **Payments By Patron Form** or **Payments By Dept Form** for deleting or adjusting a payment. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 50 characters available.

LendItems Table - QuickDOC.MDB

The primary Table for Lend information is **tblLendItems**. This table contains the following fields:

RQNO

This is the Request Number field, and is the primary key for this table. It shows up on Grids as the **ReqNo column**. It's a text field, with 14 characters available.

BORR

This is the General Code of the Library record. It should be the same as the NLM LIBID if an NLM LIBID is available. It is also the primary key of the Libraries Table (**tblLibs**), so it will be a unique identifier of the Library. It shows up on Grids as the **Borrower column**. It's a text field with 6 characters available.

Year

This is the year of publication for the item. It shows up on Grids as the **Year column**. It's a text field with 4 characters available.

Title

This is the Journal Title or monograph title for the item. It's retrieved from the Journals Table (**tblJrnls**) through the unique Journal Identifier (JID), which is stored in the JID field. It provides a way to show the Journal Title without another trip to the database. It shows up on Grids as the **Title column**. It's a text field with 100 characters available.

CHRG

This is Charge to the Borrowing Library for the type of request and delivery method requested. It's generally derived from the Library Charge Profile assigned to that library. It shows up on Grids as the **Chrg column**. It's a Currency field and only accepts numbers.

ItemType

This is the type of item requested. It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms.

Code	Displayed As
J	**Journal**
M	**Monograph**
A	**Audio-Visual**
E	Ejournal (not yet implemented)

It shows up on Grids as the **Type column**. It's a text field with 1 character available.

ItemForm

This is the form of item requested. It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms.

Code	Displayed As
C	**Copy**
O	**Original**

It shows up on Grids as the **Form column**. It's a text field with 1 character available.

EFTS

This field indicates whether the current request is from an **EFTS Library**. On DOCLINE, these requests have the word **Epayment** on the line describing the item's type. Each Library record also has an EFTS field. Only items where the Borrowing Library's record shows EFTS = True and where the item indicates Epayment at the top of the request will show a Yes in this column. This field shows up on Grids as the **EFTS column**, but only if your Library has the EFTS box checked. It's a boolean Yes/No field.

DTRE

This is the Date the request was Received. It shows up on Grids as the **Recd column**. It's a Date/Time field.

DTFL

This is the Date action was taken on the request, either filled or not. It shows up on Grids as the **Acted column**. It's a Date/Time field.

DTPD

This is the Date when payment was received from the Borrowing Library, if there is a payment made. It shows up on Grids as the **Paid column**. It's a Date/Time field.

Status

This is the current status of the request. It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms.

Code	Displayed As

R	**Received**
N	**Not Filled**
F	**Filled**
I	**Invoiced**
U	**Uploaded to EFTS**
P	**Paid**

It shows up on Grids as the **Status column**. It's a text field with 1 character available.

DelMeth

This is the Delivery Method requested (or, if the request is not filled, it contains a code for the **Referral (Rejection) Reason**). It's stored in the database as a single letter code but is normally translated to the full name before being displayed on Grids or other forms. Filled requests are:

Code	Displayed As
M	**Mail**
A	**Ariel**
E	**E-mail** (both **PDF** & **TIFF**)
W	**Web** (both **PDF** & **TIFF**)
F	Fax
K	PickUp

Not filled requests contain the Referral Reason, which will be one of the following:

Code	Value	Description
B	**BDY**	At bindery
T	**CAN**	Cancelled
P	**COP**	Copyright Statement not present
C	**CST**	Cost exceeds limits
X	**EXL**	Exceeds copy limit
I	**INC**	Incorrect citation
L	**LAC**	Lacking (issue/volume)
S	**LOS**	Lost
R	**NCR**	Non-circulating
O	**NOS**	Not on shelf
N	**NOT**	Not owned (title)
Y	**NYR**	Not yet received
D	**ORD**	On order
H	**OTH**	Other
W	**POR**	Poor condition
Z	**PRO**	In process
Q	**UFR**	Unacceptable format/routing

U	**USE**	In use

It shows up on Grids as the **Delivery column**.   It's a text field with 1 character available.

ISSN

This is the **ISSN** of the request, if any was included. It's used to look up the journal title in the Jrnls Table. The JID field becomes the final arbiter for Journal Title. It shows up on Grids as the **ISSN column**.   It's a text field with 9 characters available.

MaxCost

This is MAX COST amount that Borrower is willing to pay. It shows up on Grids as the **MaxCost column**.   On the Received Grid, items whose Max Cost value is less than the Chrg value are flagged in red. You'll get a warning if you attempt to change the Chrg column to a value greater than MaxCost, but you'll be allowed to make the change. It's a Currency field and only accepts numbers.

SRCE

This reflects the Source through which the request was received. It's stored in full, rather than as a single letter, in the database field. Legal values are:

Value	Description
DOCLINE	Requests entered into DOCLINE
OCLC	Requests entered into OCLC
RLIN	Requests entered into the RLIN system
Mail	Requests sent by Mail
Telephone	Requests made by telephone
Fax	Requests made by fax.
Other	Some other locally defined method

It shows up on Grids as the **Source column**.   It's a text field with 20 characters available.

Invoice

This field contains Invoice Numbers, EFTS Upload File identifiers and Payment Record Numbers for this item.   This allows a lookup of payment information when focus is placed in either the Status column or the Invoice column and the **To Pmts button** is clicked, which shows the **Payments Form** for deleting or adjusting a payment or Invoice. This column normally appears only in the Library Billing Grid but can be exposed in any Grid by using the Show All Grid Cols choice in the Column Context Menu.   It's a text field with 20 characters available.

JID

This is the Journal number associated with this item; it identifies the actual Journal (there are default JIDs for Monographs and Audio-Visuals), and appears at the top left of the first Tab on the Edit Journal form. As the primary key of the Journals Table (**tblJrnls**), it will be unique for each title. It is normally hidden on Grids (it's the rightmost column on Lend Grids, but can be exposed by dragging vertical line in the header of the Invoice column to the right, or by clicking **Show All Grid Cols** from the Column Context Menu, and will then appear as the **JrnlID column**.   It's a number field and is assigned by the program only.

RushRequest

This field indicates whether the current request is a Rush request or not. It displays as Yes or No. It shows up on Grids as the **Rush column**. It's a boolean Yes/No field.

Extended

This field is a numeric field and has been set aside for future use.

IFM

This field indicates whether the current request is from an **IFM Library**. If this request is to be paid using the OCLC IFM system, then the value will be Yes. Each Library record also has an IFM field. Only items where the Borrowing Library's record shows IFM = True will show a Yes in this column. This field shows up on Grids as the **IFM column**, but only if your Library has its IFM value set to True. It's a boolean Yes/No field.

LendBibs Table - QuickDOC.MDB

The **tblLendBibs** table contain bibliographic and other information related to the item in tblLendItems by Request Number. Fields are:

BibRQNO

This is the Request Number field, and is the primary key for this table. It associates this record with the record sharing this Request Number in tblLendItems. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field, with 14 characters available.

Citation

This field contains Citation information. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 50 characters available.

Article

This is the title of the article loaned. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 50 characters available.

Author

This is the author of the article loaned. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 50 characters available.

Copyright

This is the **Copyright** Statement as supplied with the request by the Borrower. It shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 1 characters available. Values are:

Value	Description
G	Copyright Guidelines
L	Copyright Law

Patron

This is the **Patron of the Borrowing Library** for whom the request is made. It's useful mostly as a reminder to the Borrower on Invoices, etc. This field shows up under associated record displays (by clicking the + sign in the leftmost Grid column) under its complete field name. It's a text field with 50 characters available.

Holdings Table in QuickDOC.MDB

The **tblHoldings** table contains Holdings information for Journals held at the Library. It's related to **tblJrnls** by the HoldingID field and is intended to be used for automated holdings lookups in versions of QuickDOC after 2.1.1. There are 12 fields in the Holdings Table:

HoldingID

HoldingStartVol

HoldingEndVol

HoldingStartYear

HoldingEndYear

HoldingNote

HoldingOnlineStart

HoldingOnlineEnd

HoldingOnlineVendor

HoldingOnlineURL

HoldingOnlineElectDelivILL

HoldingOnlineElectDelivPatron